

ASsist Guide

Addiction Services Statistical Information System Technology (ASsist)



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Review and Approved By:		
Name	Title	Signature

		Date: _____

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1. INTRODUCTION

Addiction Services Statistical Information System Technology (ASsist) is a secure, web-based, provincial client management application. ASsist runs on an Oracle database engine, which is hosted at Chief Information Office (CIO). The application collects and manages information on clients receiving treatment specific to substance and/or gambling issues at all points across the continuum of care (health enhancement to intensive treatment). In particular, the application collects the following data components: Client Profile, Intake, Assessment, Program Registration, Group/Session, Activity/Workload, Discharge, and Referral.

The two main objectives of ASsist are improved client care and improved accountability. These objectives are met by:

- Collecting more inclusive client information;
- Tracking client treatment history across the continuum of care;
- Increasing accessibility of client information to treatment providers; and
- Conducting quality initiatives; and developing report functionality.

Addiction Services staff within the District Health Authorities (DHAs) use ASsist as an integral part of client treatment, which has created a streamlined approach to some components of service delivery. Addiction Services (both DHAs and Department of Health and Wellness - DHW) also utilize ASsist to monitor and evaluate programs/services, measure service standards and produce accountability reports.

1.1.1 *Scope of this Guide*

This guide contains information and procedures that is pertinent to the use of the ASsist system. The intent is to provide enough detail to the reader, so the steps required to complete specific functions in ASsist can be executed.

This guide is not specific to user roles at Addiction Services. It covers the system functionality; but does not describe the business processes which relate specific system function.

This guide does not include specific information on the **TREAT** application. Please refer to the ASsist Knowledge Centre for more information on TREAT and to access the TREAT User Manual.

This guide does not include instruction of the ASsist reporting functionality.

1.1.2 Related Documents

In order to fully understand the content of this guide, it is encouraged that the following documents are read and understood. These can all be found on Knowledge Center.

- TREAT User Manual;
- ASsist Data Definitions;
- Flash File Training Videos;
- ASsist Client File Correction Form;
- ASsist Training Checklist; and
- Other user reference material.

1.1.3 Getting Started

First, access to the ASsist application is required. Depending on level of access, you may not be able to view or execute certain functions described in this manual. Specific user access and privileges will be reviewed in Section 4 (User Roles and Responsibilities).

NOTE:

The words “application” and “system” will be used interchangeably in this manual in reference to ASsist.

1.1.4 Glossary of Acronyms

A number of Acronyms are used throughout this manual. A complete list is presented below.

1. ASsist: Addiction Services Statistical Information System Technology;
2. CIO: Chief Information Office;
3. DHA: District Health Authority;
4. DHW: Nova Scotia Department of Health and Wellness;
5. PAC: Provincial ASsist Committee;
6. PIA: Privacy Impact Assessment;
7. SSA: Shared Service Area; and,
8. TREAT: The Roster of Electronic Assessment Tools.

2. THE PURPOSE OF ASSIST

To better account for Addiction Services' clients, and to improve reporting capacity, the Nova Scotia government acquired a web-based computer application, Catalyst, from the Ontario Ministry of Health in 2004. Catalyst was redesigned and modified to meet the needs of Nova Scotia; it was transformed into the ASsist application and initially rolled out in 2005. Provincial Implementation was complete in 2007.

The application is funded and maintained by Nova Scotia Department of Health and Wellness. At a provincial level, the system is supported by the Provincial ASsist Administrator and the ASsist Application Specialist, as well as CIO, DHW IT, and external consultants.

ASsist requires the input of client information and enables improved client record management and reporting capacity. The ASsist application promotes accountability to clients, staff, programs and stakeholders.

Primary Objective: Better Client Care & Improved Accountability.

To do this, ASsist:

- Includes functionality for tracking client treatment/services: Client Profile Information, Intake/Booking, Program Registration, Daily Service Record, Group/Session Discharge/Case Closure and Referral Recommendation;
- Provides clinicians with complete client history;
- Includes functionality for workload measurement;
- Automates many of the manual data collection processes for reporting (i.e. CIHI);
- Provides Nova Scotia Department of Health and Wellness (DHW), District Health Authorities (DHAs) and IWK Health Centre with Addiction Services data;
- Enables measurement of Provincial Addiction Services System Standards; and
- Enables reporting for federal/provincial recoveries and other accountabilities.

ASsist provides improved service to clients because:

- Clinicians have a provincial client history and more information to help provide better treatment;
- There is an increase of privacy and security of information; and
- There is consistency between offices within the province of Nova Scotia.

ASsist will benefit the organization because it provides:

- More accessibility and flexibility for the business;
- Matches to outcomes and performance;
- More data fields collected for research/analysis and reporting; and
- Satisfies funding agreements.

3. ASSIST PRIVACY POLICY & TRAINING

3.1 Policies

3.1.1 *Policy Statement*

This policy was adopted, with permission, from the Nova Scotia Hospital Information System Privacy and Security policy. The ASsist Project recognizes the client's right to have his/her personal information protected against unauthorized access or misuse of information. Protection of client privacy is the individual responsibility of every user of ASsist.

3.1.2 *Access to client information on the ASsist*

No user shall be authorized to have access to the ASsist until she or he has:

- Completed the mandatory ASsist privacy training; and
- Signed an ASsist Conditions of Appropriate Use document.

3.1.3 *Authorized versus unauthorized access*

1. A user is only authorized to access information on ASsist to aid in the performance of his/her job functions, related to the provision, support or tracking of client treatment.
2. Unauthorized access to client information on the ASsist is prohibited.
 - Unauthorized access is defined as access to client information that is not required to perform the functions of a user's job.
3. Any incident of unauthorized access may be investigated as a breach of client privacy.

3.1.4 *User Profiles*

User profiles are determined and set by the Provincial ASsist Administrator and/or the District Health Authority ASsist Champions (RSO's, QMC's, etc); and may not be amended or altered by any other user.

3.1.5 *Password Protocol*

1. Do not reveal passwords to another person, or allow passwords to be accessible by another person.
2. If it is suspected that a password has become available to another person, immediately change the password, and notify the supervisor.
3. Do not access client information or enter client information under using an ASsist username and password that is not your own, and do not allow another person to access or enter information using your username and password.
4. The ASsist Administrator(s) will not reset a password until the user has provided a completed Challenge & Response form.

5. Do not store passwords in a file on a computer, where it can be accessed by another person, who can then subsequently access ASsist.

3.1.6 *Protection of Information on ASsist Screens*

If client information is visible on a computer screen, take all reasonable precautions to ensure that the information is not visible to any person who is not authorized to view the information.

3.1.7 *Audit and Monitoring*

1. An “access log” is the report generated by the Provincial ASsist Administrator, which contains information related to a specific user’s access to client information.
2. An audit may be performed on any user’s system access history any time and without notice or warning.
3. The Provincial ASsist Administrator shall produce access logs on randomly chosen users on a regular basis.
4. The Provincial ASsist Team shall forward access logs to the relevant District Health Authority for review.
5. Every District Health Authority shall have in place a process for a review of access logs that is consistent with ASsist guidelines.
6. Every District Health Authority shall identify a position or committee who will be accountable for the review of access logs and other ASsist privacy issues, including:
 - a. Receiving the access logs from ASsist;
 - b. Investigating the access logs to determine if any access was unauthorized;
 - c. Ensuring that unauthorized access is dealt with appropriately;
 - d. Requesting additional access logs as appropriate;
 - e. Identifying ASsist specific privacy training needs; and
 - f. Reviewing internal recommendations for changes to access privileges.
7. Within 30 days of receiving the access logs, the position or committee accountable for ASsist privacy issues shall provide a summary of the findings of the review to the Provincial ASsist Administrator.

3.1.8 *Client right to request an audit*

1. A client may request the production of an access log for his/her ASsist treatment record.
2. All requests for access logs must be in writing.
3. Every District Health Authority shall have in place a process for handling requests for access logs that is consistent with the ASsist guidelines.
4. Clients must follow the DHA request for information processes.
5. Clients will be encouraged to provide any information related to their request which may help define the scope of the access log.

3.1.9 Confidentiality

1. Confidentiality is defined as the obligation of one person to preserve the privacy of another's personal information.
2. Nothing in this policy diminishes the existing confidentiality obligations on ASsist users, as defined in employee contracts, confidentiality agreements with their employer, and the code of conduct or regulating legislation of their profession.

3.1.10 Change in user employment status

1. To ensure that user access is properly maintained, every District Health Authority shall provide the Provincial ASsist Team with information related to the following changes in a user's employment status:
 - a. Termination of employment;
 - b. Change in job functions which changes the user's need for access where the change is for longer than 30 days;
 - c. Suspension of employment;
 - d. Maternity or parental leave of over 30 days;
 - e. Leave of absence of over 30 days; and
 - f. Sick leave, short or long term disability of over 30 days.
2. The District Health Authority shall provide the information to the ASsist Project prior to or immediately upon the date that the DHA confirms that there will be a change in status.

3.2 Privacy Training

The following training information must be reviewed before access to ASsist can be granted. Following the training, a Conditions of Appropriate Use form must be signed and submitted to a manager or supervisor. A copy of the signed form will be sent for retention at DHW, and the original will be placed in the user's personnel file.

3.2.1 Privacy & ASsist

1. The protection of client privacy is extremely important to ASsist, and is the obligation of every individual user of the system.
2. All client information held on the system (and in any paper records) should be considered sensitive and deserving of full protection.
3. The obligation to conduct oneself ethically and responsibility in terms of client privacy is not new.
 - a. Obligations to conduct oneself ethically and appropriately are found in professional Codes of Ethics or Conduct, agreements, etc.
4. The ASsist project puts a spotlight on the importance of protecting client privacy.
 - a. Some "practices" which may have existed in the past will no longer be permitted; and

- b. Because of the way access to the system is designed, access to client information is much more standardized and monitored.
5. The next several sections will examine the importance of understanding the difference between privacy, confidentiality and security, and the role of each in ASsist.

3.2.2 Privacy

1. An individual's right to protection of the data regarding him/her against misuse or unauthorized disclosure (COACH, 1995).
 - a. Each client in Addiction Services information system has the right to have his/her information treated with respect; and
 - b. This right applies to all information, not just information that the user considers to be "sensitive".

3.2.3 Confidentiality

1. The obligations on one person to preserve the secrecy of another's personal information (Canada Health Infoway, OHIH 1999).
2. Confidentiality agreements are not enough; they usually only cover the obligation not to disclose.
3. Users of ASsist are only authorized to view information, which is directly related to their job.
4. "Don't look" and "Don't Tell."

3.2.4 Security

1. The procedures and systems used to restrict access and preserve the integrity of the information (Canada Health Infoway, OHIH 1999).
2. Security doesn't just relate to the technical infrastructure of the system. It includes security measures within the control of the user, including compliance with the standards.

3.2.5 Security Standards

1. Do not share a password with any other person, including any other user. Sharing of passwords is considered to be a serious breach of security, and will be followed up with as such. Remember – when a person shares his or her password, he or she is responsible for any actions carried out by the person who has the password.
2. Do not allow anyone to enter information under your username and password.
3. If you believe that any person has knowledge of your password, change your password immediately and notify your supervisor.
4. Never leave the terminal unattended while logged into ASsist.
5. Log off the system as soon as work is completed.

6. As with paper records, ensure that the active screen is *not* visible to any other person except those directly involved with the client's treatment. Prevent any attempts by clients, the public or any other person to read your screen by covering the screen or suspending the work.

3.2.6 Breach

1. Breach of electronic information is defined as an abuse of authorized access leading to *inappropriate disclosure or use* of information.
2. This abuse may or may not have a detrimental impact on the client, family and/or the facility (IWK, 1998).

3.2.7 Appropriate Use of the System

1. Users are *never* authorized to use ASsist for any personal non-work related reason.
2. When in doubt – ask your supervisor.

3.2.8 Unauthorized Use

1. Looking up the treatment record of any client if you are not required to do so for your job. This includes but is not limited to:
 - a. Looking up the treatment records of a friend, relative or colleague to “check up on them” (even with the permission of the client); and
 - b. Looking up one's own record.

3.2.9 Monitoring & Audit

1. All activity on the system is recorded and can be pulled out in an audit log.
2. Users of the system can be audited at any time and without notice.
3. Random audits will be conducted every month/regularly.
4. A client has the right to request a full audit log be pulled for his/her course of treatment.
5. All audit logs will be reviewed and all potential breaches investigated.

3.2.10 Conditions of Use Document

1. Every user of the system is required to sign a Conditions of Use Document prior to receiving a username and password.
2. The document outlines the appropriate use of the system from both a standards and privacy perspective.
3. The document supplements all current obligations related to the user's work and appropriate conduct and ethics.

3.2.11 Key Points to Remember

1. All users of the system are responsible for safeguarding the information they have access to see.

2. The procedures outlined in this training session are not to be exclusive to any existing Addiction Services or District Health Authority policies.
3. Please contact your supervisor if you have questions or wish to obtain a copy of AS or DHA specific policies
4. When you share your password, YOU are responsible for any actions carried out by the person who has your password.

3.2.12 Acknowledgement

Acknowledgement is given to the Nova Scotia Hospital Information System (NSHIS) for amended use of their Privacy & Security documentation.

3.2.13 Congratulations!

You have successfully completed your ASsist Privacy & Security Training Session. Please sign your Conditions of Use document and submit to your supervisor.



4. USER ROLES & RESPONSIBILITIES

Each user of the system will be assigned a role based on their usage needs of the ASsist application. Each role grants different privileges to the user. Below are the User Roles along with the Access each role provides to the application.

NOTE:

This user guide does not indicate which functions are specific to which users. This guide focuses on system functionality. Be aware of your own role, and realize that you may not have the permissions to perform all the system functionality as described in this manual.

4.1.1 Administrator

This user type has:

- Complete access to the entire application;
- Access to Routine Reporting;
- Access to Ad-hoc Reporting;
- Access to User and Staff Administration;
- Access to List Administration; and
- Can delete clients after 10 years.

4.1.2 Data Entry

This user type has:

- Access to all Treatment and P&CE screens except Administration screens;
- Access to Routine Reporting;
- Search Clients using the Case Number, Health Card Number plus the Issuer, or by using the First Name, Last Name, and Date of birth for the client;
- Create a Client Case Number;
- View, Enter, Update and Print Client Profiles;
- View, Enter and Update Program Registration/Discharge;
- View, Enter and Update Referrals;
- View, Enter and Update Daily Service Records;
- View, Enter and Update Groups;
- View, Enter and Update Group Sessions;
- View, Enter and Update TREAT; and
- View, Enter and Update P&CE Module.

4.1.3 Data Entry Supervisor

This user type has:

- Access to all Treatment and P&CE screens except Administration screens;
- Access to Routine Reporting;
- Access to expanded search functionality;
- Create a Client Case Number;
- View, Enter, Update and Print Client Profiles;
- View, Enter and Update Program Registration/Discharge;
- View, Enter and Update Referrals;
- View, Enter and Update Daily Service Records;
- View, Enter and Update Groups;
- View, Enter and Update Group Sessions;
- View, Enter and Update TREAT; and
- View, Enter and Update P&CE Module.

4.1.4 *Manager*

This user type has:

- Access to all Treatment and P&CE screens except Administration screens only to view;
- Access to Routine Reporting functionality;
- Search Clients using the Case Number, Health Card Number plus the Issuer, or by using the First Name, Last Name, and Date of birth for the client;
- Create a Client Case Number;
- View, Enter, Update and Print Client Profiles;
- View, Enter and Update Program Registration/Discharge;
- View, Enter and Update Referrals;
- View, Enter and Update Daily Service Records;
- View, Enter and Update Groups;
- View, Enter and Update Group Sessions;
- View, Enter and Update TREAT; and
- View, Enter and Update P&CE Module.

4.1.5 *P&CE*

This user type has:

- Access to all P&CE screens;
- Access to Routine Reporting;
- Search clients within P&CE module;
- View, Enter, Update P&CE modules;
- Cannot delete; and
- Access to any P&CE screens available within the application.

4.1.6 *Research and Statistical Officer*

This user type has:

- Access to all Treatment and P&CE screens except Administration screens;
- Create new users;
- Access to Routine Reporting;
- Access to Ad Hoc reporting through ReportNet;
- Access to expanded search functionality;
- Create a Client Case Number;
- View, Enter and Update User Profiles;
- View, Enter, Update and Print Client Profiles;
- View, Enter and Update Program Registration/Discharge;
- View, Enter and Update Internal Transfers/External Outgoing Referrals;
- View, Enter and Update Daily Service Records;
- View, Enter and Update Groups;
- View, Enter and Update Group Sessions;
- View, Enter and Update TREAT;
- View, Enter and Update P&CE Module;
- Support the System for Data Entry Users;
- Requests for Information, subpoenas; and
- Can delete clients after 10 years.

4.1.7 *Research and Statistical Officer (Provincial)*

This user type has:

- Access to all Treatment screens except P&CE screens and Administration screens;
- Access to Routine Reporting Access;
- Search Clients using the Case Number, Health Card Number plus the Issuer, or by using the First Name, Last Name, and Date of birth for the client;
- Create a Client Case Number;
- View Print Client Profiles;
- View Program Registration/Discharge;
- View Referrals;
- View Daily Service Records;
- View Groups;
- View Group Sessions; and
- View TREAT.

4.1.8 *Treatment*

This user type has:

- Access to all Treatment screens except P&CE screens and Administration screens;
- Access to Routine Reporting Access;

- Search Clients using the Case Number, Health Card Number plus the Issuer, or by using the First Name, Last Name, and Date of birth for the client;
- Create a Client Case Number;
- View, Enter, Update and Print Client Profiles;
- View, Enter and Update Program Registration/Discharge;
- View, Enter and Update Referrals;
- View, Enter and Update Daily Service Records;
- View, Enter and Update Groups;
- View, Enter and Update Group Sessions; and
- View, Enter and Update TREAT.

4.1.9 Treatment (View Only)

This user type has:

- Access to all Treatment screens except P&CE screens and Administration screens;
- Access to Routine Reporting Access;
- Search Clients using the Case Number, Health Card Number plus the Issuer, or by using the First Name, Last Name, and Date of birth for the client;
- Create a Client Case Number;
- View Print Client Profiles;
- View Program Registration/Discharge;
- View Referrals;
- View Daily Service Records;
- View Groups;
- View Group Sessions; and
- View TREAT.

5. ASSIST GUIDE

5.1 Introduction

This document should be referenced by users of the ASsist application as a guide to navigate through the system and perform specific functionality.

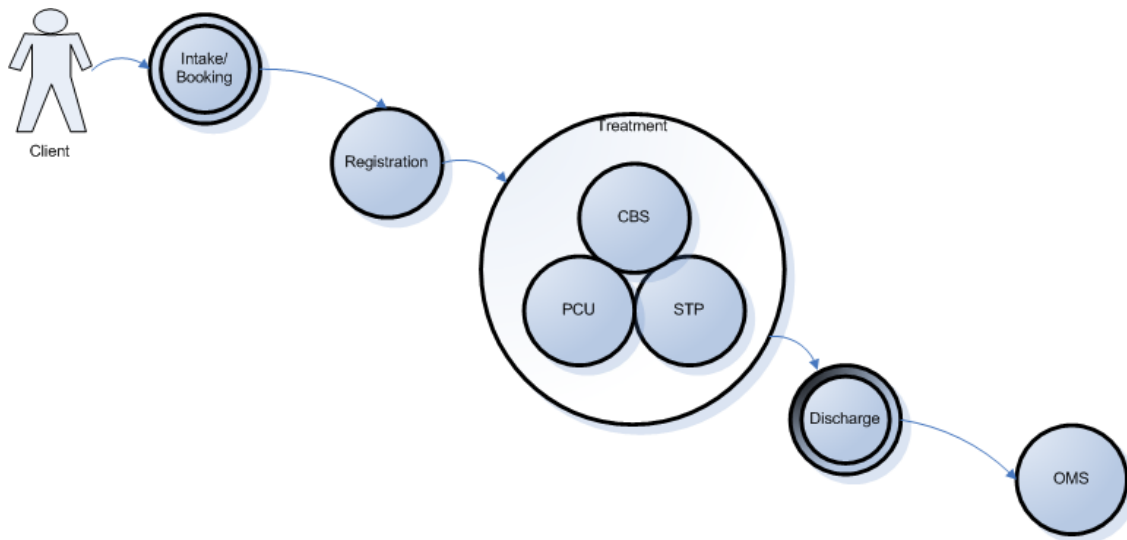
5.1.1 *General Information and User Requirements*

The following are the pre-requisites to using the ASsist application:

- *Network Access* – The Novell username and password that gains access to workstations in Addiction Services environment will be provided by local Information Technology (IT) personnel, e.g. CHOICES employees will receive their network access from the IT personnel of the IWK;
- *PC with web-browser that is on the NShealth network (or Virtual Private Network- VPN to the Provincial Database Network)*. The application is not available outside of the Nova Scotia health or provincial database environment, e.g. it is not possible to access the website from your home computer;
- *Basic computer and web skills* – The ASsist application is very similar to other web based applications and forms;
- *Privacy Training and ASsist Conditions of Use Form* – All users will need to complete Privacy Training and sign a Conditions of Appropriate Use form prior to being given access to ASsist; and
- *ASsist Username and Password* – The username and initial password will be provided by the Research and Statistical Officer (RSO) or Provincial ASsist Administrator (PAA). Only authorized Addiction Services employees have access to the ASsist application.

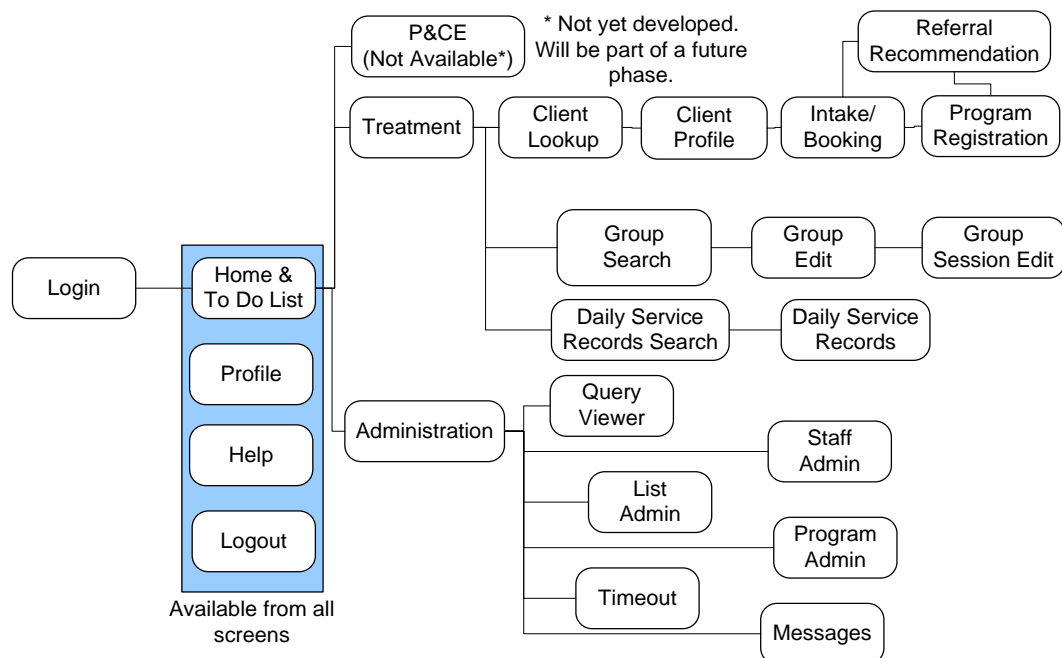
5.1.2 *High Level Client Progression Process*

The following diagram depicts the high-level process for a client that is treated in an Addiction Services' program.



5.1.3 Navigation Map

The following diagram depicts the site map for the ASsist application. Each box represents a different page or 'screen' and also shows how screens can be navigated.



The complete set of 'Administration' screens is only available to ASsist Administrators. Research and Statistical Officers (RSOs) may create/view/update privileges on the Query Viewer and Staff Admin screens and view only privileges on the remaining administration screens.

5.1.4 General Layout

There are three main sections to each screen in the ASsist application:




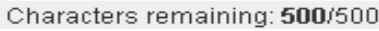






1. **Treatment Menu Items** (outlined in yellow). The user has the following menu item choices in the Treatment module.
 - Home – Links to the ASsist Home screen;
 - PCE – Links to Prevention Module (Not yet available);
 - Treatment – Links to the following
 - Lookup – Links to the Client Lookup screen;
 - Clients – Links the Client Profile, Intake/Booking, Program Registration/Discharge and Referral Recommendation screens;
 - Groups – Links to the Group Search, Group Edit and Group Session screens; and
 - Daily Service Records – Links to the Daily Service Record Search and Daily Service Records screens; and,
 - Administration – Links to the Query Viewer, Staff Admin, List Admin, Program Admin, Messages, and Timeouts screens.
2. **User Menu** (outlined in green). These links are available from each screen.
 - Profile – Displays user information and allows users to change their own password;
 - Help – Links to the training manual; and
 - Logout – Explicitly ends a user's session in ASsist.
3. **Main Body** (outlined in red). Where the data fields and the content of ASsist are found.















The following diagram depicts the general layout of each screen.

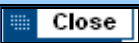









The screenshot displays the ASsist application interface. At the top, there is a header bar with the 'ASsist' logo on the left and 'Addiction Services' on the right. Below the header is a navigation bar with links: Home, Lookup, Clients, Groups, Daily Service Records, Profile, Help, and Logout. The main content area is divided into three sections: 1. **Treatment Menu Items** (outlined in yellow): This section contains two search fields, 'Lookup by Case No.' and 'Lookup by Client Id.', each with a 'Lookup' button and a 'Clear' button. 2. **User Menu** (outlined in green): This section is located on the right side of the interface and contains links for 'Profile', 'Help', and 'Logout'. 3. **Main Body - Treatment Data** (outlined in red): This section contains a form for entering client information. The form includes fields for Case No., Old StatIS Case Numbers, Last Name, First Name, Middle Name, Last Name at Birth, Alias/Goes By, Gender, Date of Birth, Age, Contact Phone, Health Card Number, Health Card Expiry Date, Health Card Issuer, Issuer Description, Collection Staff, and Collection Date. There are also checkboxes for 'Phone Call Allowed' and 'Message Allowed'. A 'Create Case Number' button is located at the bottom right of the form.

5.1.5 ASsist Icons and Elements

The following table lists the graphical icons and elements used in the ASsist application to help users enter information and navigate the application.

Icon	Element Description
	Login: This button, when clicked, authorizes whether the username and password are valid. If valid, then the user gains access to ASsist; if not, the user is denied access.
	Change Password: This button, when clicked, resets a password.
	Empty Text Box: A field where text may be entered.
	Characters Remaining Count: A visual counter, found under a text box, indicating the number of characters remaining out of the total possible within the affiliated text box.
	<p>The arrow buttons are used to populate multi-select boxes.</p> <ul style="list-style-type: none"> • Right Double Arrow: All items are selected from an available select box on the left, and moved to the selected box on the right; • Right Single Arrow: A selected item in the available select box will be added to the selected box on the right; • Left Single Arrow: A selected item in the selected box will be deselected, and removed from the selected box; and • Left Double Arrow: All items in the selected box will be deselected, and removed from the selected box.
	Clear Button: Clears the currently populated fields.
	Lookup Icon: This icon appears beside data fields that can be used to search or 'lookup' details.
	Lookup Button: Clicking the Lookup button searches for the details corresponding to the item(s) being looked for. For example, to search for a client, input a Case Number in the Search Case No. field, and click the Lookup button.
	Create Case Number: This button appears on the client profile screen. Clicking it creates a case number for a new client.
	Save Button: This button saves the contents of a screen. The save button can be used to save

Icon	Element Description
	information, even if the screen is missing details.
	Asterisk: The presence of an asterisk beside a field denotes that the field is mandatory, and must contain valid data.
	Error Icon: Appears beside a field that requires information or contains invalid data.
	Information Icon: Appears beside a field that requires data in order for other actions to occur. This icon is also used to indicate that information entered on a screen has been successfully saved.
	Create New (Add) Icon: Allows the user to create a new item. For example, when found on the Intake screen, it allows for the creation of a new Intake.
	Edit/View Icon: Clicking the edit icon enables the user to view and/or edit the contents of the field the icon appears beside.
	Calendar Control Icon: This icon appears next to every field requiring a date. Clicking the calendar opens a calendar, which allows for easy date selection. The date is defaulted to current date when the date field is blank.
	Accept Icon: Accepts the contents of a row.
	Cancel Icon: Cancels or deletes the content in a row.
	Refresh List Icon: Refreshes the items in a list (for example, To Do List).
	Appears in the columns of lists, and controls the sorting of the items in the list. <ul style="list-style-type: none"> • Up Arrow: Sorts in ascending order; • Down Arrow: Sorts in descending order; and • Double Arrow: Denotes that the column may be sorted.
	Print Icon: Prompts a print filter for printing documents. Documents can be printed to paper using this icon, or they can be viewed on the screen (print preview).
	Print Button: Displays a print friendly preview of the information on the screen, and allows for printing to a printer.
	Refresh Display Options: Refreshes the database with changes made to display level (for example, summary or detail) on the print filter.
	Back Button: Returns the view to the previous page.

Icon	Element Description
	Close Button: Safely closes the printer window.
	Open Active Icon: Indicates that a client file is open and active.
	Open Inactive Icon: Indicates that a client file is open and inactive. The file needs to be updated or closed.
	Closed Icon: Indicates that a client file is closed.
	TREAT Button: Appears on the Client Profile screen. When clicked, takes the user into The Roster of Electronic Assessment Tools (TREAT).
	Load Button: Loads a file or list of values (for example, staff record on Staff Admin screen).
	Refresh Defaults: Refreshes the list of default “charge to” accounts of the Staff Admin screen.
	Delete Button: Only accessible to Quality Management Coordinator (QMC), Research and Statistical Officer (RSO) and the Provincial ASsist Administrator (PAA). When clicked the system will delete a complete or partial client record from the database, however, the record will remain on the history tables.
	Shred Button: Only accessible to the Provincial ASsist Administrator (PAA), and will permanently delete a complete client record from both the database and history tables.
	Merge Button: Only accessible to the Provincial ASsist Administrator (PAA), and will merge two client case numbers and associated client records into one file in both the database and history tables.

5.1.6 *Mandatory and Optional Fields*

The information that is entered into ASsist should be as complete and accurate as possible. The field requirements within the ASsist application include the following.

Field Filling Requirement	Definition/Explanation
Mandatory on Save	The field must contain information before the screen can be saved. Mandatory on save fields are denoted with an asterisk (*).
Mandatory	The field must contain valid information. The next step in the process cannot be accessed if a mandatory field does

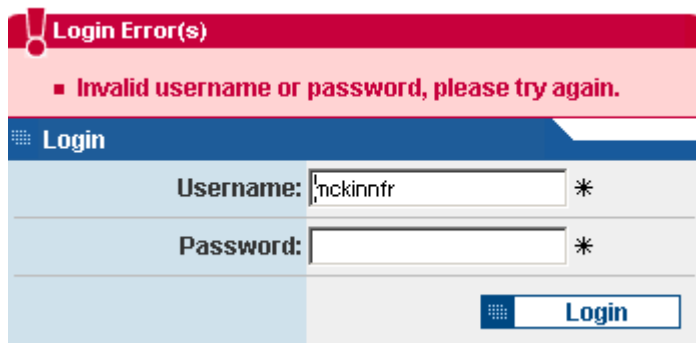
Field Filling Requirement	Definition/Explanation
	not contain a valid value (for example, cannot proceed from Intake to a Program Registration if mandatory fields are not populated correctly).
Dependant Mandatory	The field must contain information, but only as a result of previous field being populated with a value (for example, the Relationship and Emergency Telephone fields become mandatory fields only when an Emergency Contact Name is provided).
Optional	The field is not required to contain information. Note: Some fields that are defined optional by ASsist may be Mandatory according to a business process in a specific DHA. In such a case, users would be expected to populate the field.
System	A system field is a field that is automatically populated by the system, for example, Activity ID or Case Number.
Optional System	The field may or may not contain information, and it is created by and appears only within the application.

5.1.7 Error and Informational Messages ALERTS/WARNINGS/MOUSE OVERS


Mistakes are inevitably made when entering data or performing transactions. Within ASsist, errors are commonly the result of an omission to enter information in a mandatory field, attempting to enter numeric values in an alpha character field, or trying to access the application with the wrong username/password.

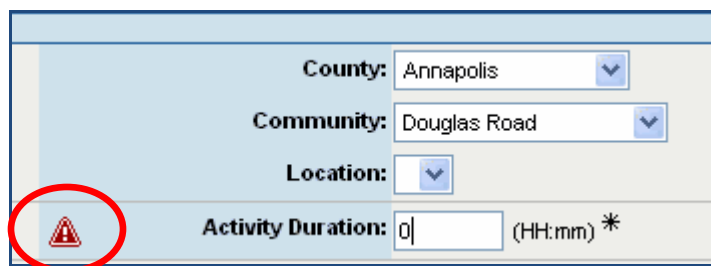
Errors

When errors occur, the application will automatically prompt the user by placing an error message at the top of the screen. A red message generally means that the application requires further information or information has been entered incorrectly. If there are multiple errors or omissions, each error will be displayed in the message box.



The screenshot shows a red banner at the top with a warning icon and the text "Login Error(s)". Below the banner, a red message box contains the text "Invalid username or password, please try again." Below this is a login form with fields for "Username:" (containing "nckinnfr") and "Password:" (empty). Both fields have an asterisk (*) indicating they are mandatory. A "Login" button is located at the bottom right of the form.

Also, an error symbol  will appear beside the field or section that contains the error or omission, as shown here (circled in red).



The screenshot shows a form with fields for "County:" (Annapolis), "Community:" (Douglas Road), "Location:" (empty), and "Activity Duration:" (0). The "Activity Duration" field has an asterisk (*) indicating it is mandatory. A warning icon (a triangle with an exclamation mark) is circled in red next to the "Activity Duration" field.


Sometimes an unexpected system or database error will occur. In such instances, the designated person in the Shared Service Area (SSA) or the Provincial ASsist Team should be contacted. When reporting such occurrences, note the following.

- Time of day the error occurred;
- The exact wording of the error message; and
- What action was being performed when the error occurred and any client related information (for example, the action was saving the client profile, and the client information is the case number or the client name).

An example of a database error is shown.

The screenshot shows the ASsist web application interface. At the top, there is a navigation bar with links: Home, Lookup, Clients, Groups, Daily Service Records, Profile, Help, and Logout. Below the navigation bar, a header section displays client information: Group Id: 2237, Organizing Staff: Hayward, b.d., Terrilyn(100246), Program Group Affiliated With: CBS Nicotine, Start Date: 2008/02/14, End Date: 2008/02/14, Group Number: , Organizing Site: Annapolis CBS, Group Topic: Smoke Free Environments, and Group Name: STOP. A red error message banner states: "The following errors must be corrected ... An unknown system error has occurred, please contact support." Below the error message, the "Group Session" section is visible, containing fields for Group Session Id, Session Date (2008/02/14), Session Time (24hr): 14:00, Session Duration: 60, and a section for specifying a location if other than the organizing site, with dropdowns for Other Site, Other County (Annapolis), Other Community (Deep Brook), and Other Location.

Informational Messages

ASsist also provides informational and success notification messages. A blue colored message indicates that more information may be required to move forward in the application. An information icon  will appear beside the field or section that is required to proceed. An information message may be used to indicate a successful save. An example of an informational message appears below.

The screenshot shows the ASsist web application interface with an informational message. The message, titled "Note the following ...", lists four items: "Reason for Client's Contact is required.", "Client's Last Use or Gamble is required.", "Treatment History is required.", and "The Intake has been successfully saved." Below the message, there are dropdown menus for Site (Amherst CBS) and radio buttons for Bed Required (Yes, No, Unknown) and Withdrawal Management (Yes, No, Unknown). The "Intake" section is highlighted, showing the "Introduction" sub-section. It contains fields for Intake Id (19105), Start Date and Time (2008/02/01 20:43), Internal Referral (within Provincial AS): 2008/01/10, Antigonish CBS, TO: STP 21 Day, Referring Agency (Please select), Referral Received On (), Referring Contact Name (), Pregnancy Indicated? (checkbox), Referral Mandatory (checkbox), and Referring Telephone ().

HTTP Status 500 Error

An example of an HTTP Status 500 error is below. This type of error generally would only occur if there is an issue communicating with the ASsist server. A loss in network connectivity would be an example of when a user may encounter the HTTP Status 500 error.

HTTP Status 500 -

type

Exception report

message

description

The server encountered an internal error () that prevented it from fulfilling this request.

exception

```

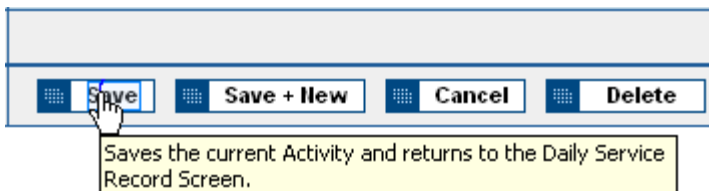
javax.servlet.ServletException
    org.apache.struts.action.RequestProcessor.processException(Ljavax.
    com.cc.framework.adapter.struts.FWTilesRequestProcessor.processAct
    ca.ns.gov.assist.struts.action.ASsistRequestProcessor.processActio
    org.apache.struts.action.RequestProcessor.process(Ljavax.servlet.H
    org.apache.struts.action.ActionServlet.process(Ljavax.servlet.http
    ca.ns.gov.assist.struts.action.ASsistActionServlet.process(Ljavax.
    org.apache.struts.action.ActionServlet.doGet(Ljavax.servlet.http.H
    javax.servlet.http.HttpServlet.service(Ljavax.servlet.http.HttpSer
    javax.servlet.http.HttpServlet.service(Ljavax.servlet.ServletReque

```

Mouse Overs

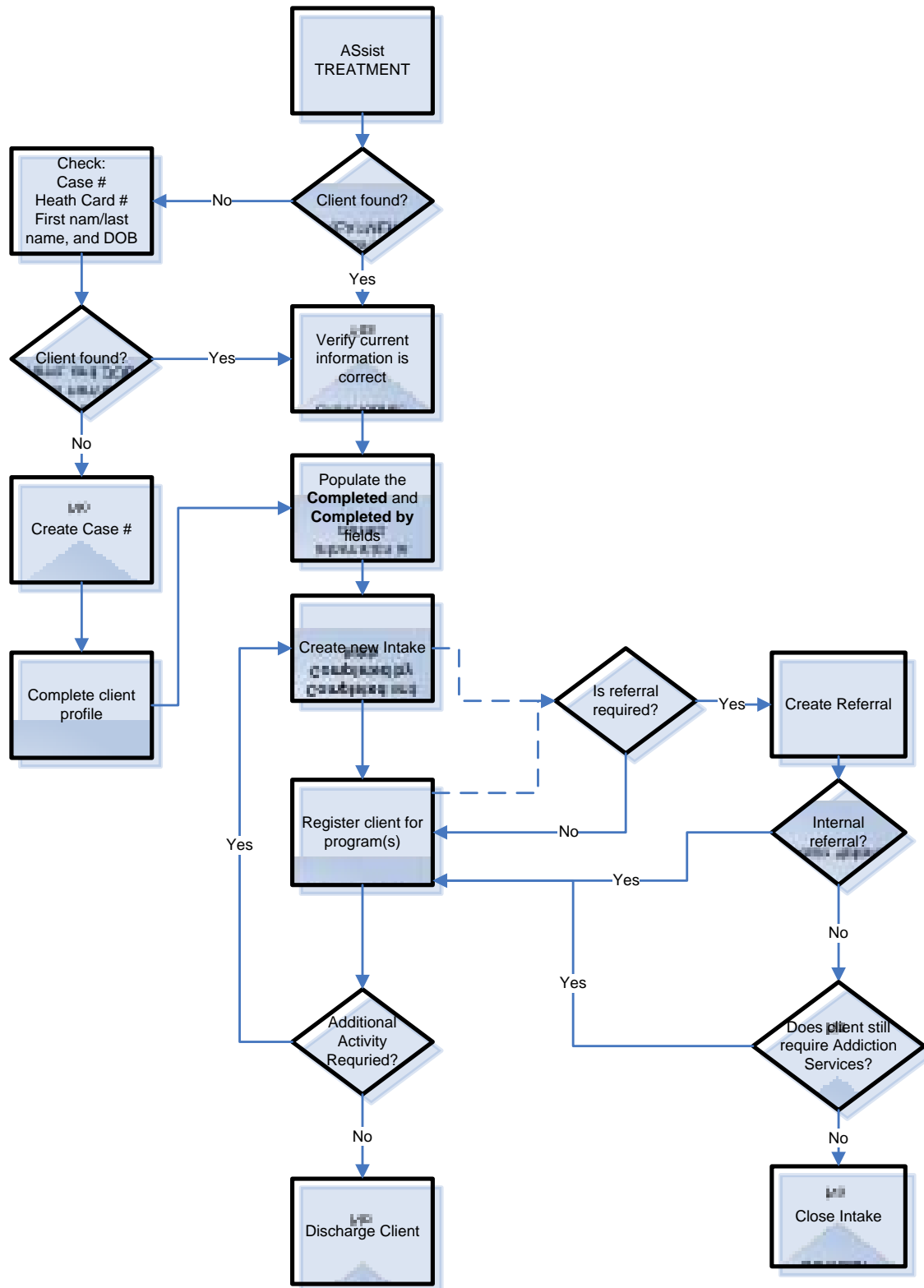
ASsist also provides users helpful information when filling out specific fields or performing specific functions by using the Mouse-over functionality. These tips pop up in a yellow frame and display helpful information about that specific field or function, to assist the user in entering the correct details.

An example of a mouse-over tool-tip is below. In this example, the mouse over is explaining details about the **Save** button. Hold the mouse cursor over the save button, and the mouse-over pops up.



5.1.8 TREATMENT process flow for ASsist

The following diagram represents the regular flow for the Treatment usage of ASsist.



5.2 Logging into ASsist

ASsist is a browser-based application, so it utilizes the web-browser that resides on each workstation. The standard browser is Internet Explorer. The application is only available on the NShealth network and is unavailable outside Nova Scotia healthcare and Addiction Services facilities.

Follow these steps to get to the Login page of ASsist.

1. Open an Internet browser. To do this, click on the Internet Explorer icon. It is available either on the desktop of the application or from the Start menu in the lower left of the screen.



2. When the browser opens, enter the following web address in the address line of the browser: <https://assist.hss.gov.ns.ca/assist/home.do>
3. The ASsist Login page will appear.

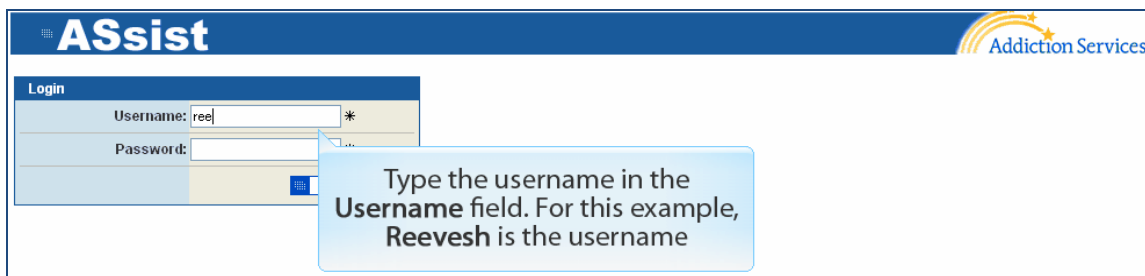
5.2.1 Logging into ASsist

In order to login to ASsist, every user requires an ASsist username and initial password. The initial password (provided by Addiction Services) will need to be changed when the user first logs into ASsist.

The username should be a maximum 8-letter combination of the user's last name and initials of first and middle name. The username is the ID that is provided by Addiction Services.

To Log into ASsist.

1. In the **Username** textbox, type the username. For this example, the username **Reevesh** is used.

The image shows a screenshot of the ASsist Login page. The page has a blue header with the 'ASsist' logo on the left and the 'Addiction Services' logo on the right. Below the header is a 'Login' section with two textboxes: 'Username:' and 'Password:'. The 'Username:' textbox contains the text 'ree'. A blue callout box with white text points to the 'Username:' field, stating: 'Type the username in the Username field. For this example, Reevesh is the username'. There is a blue login button to the right of the password field.

2. In the **Password** textbox, type the password that was provided by Addiction Services. The password is not displayed on the screen for security reasons.



ASsist Addiction Services

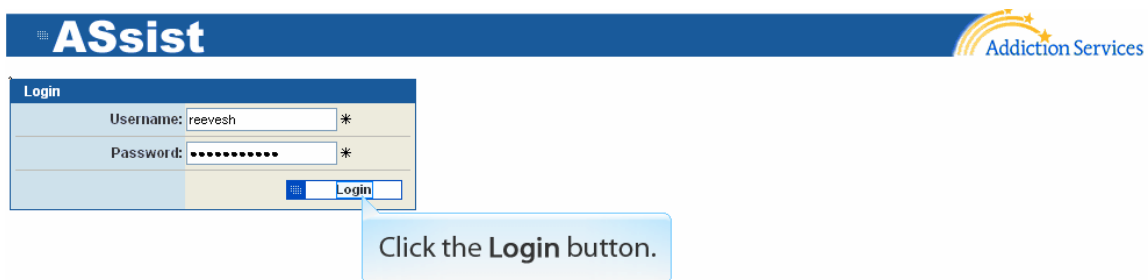
Login

Username: reevesh *

Password: *

Type the password in the **Password** field. The password is not displayed on the screen for security reasons

3. Click the **Login** button.



ASsist Addiction Services

Login

Username: reevesh *

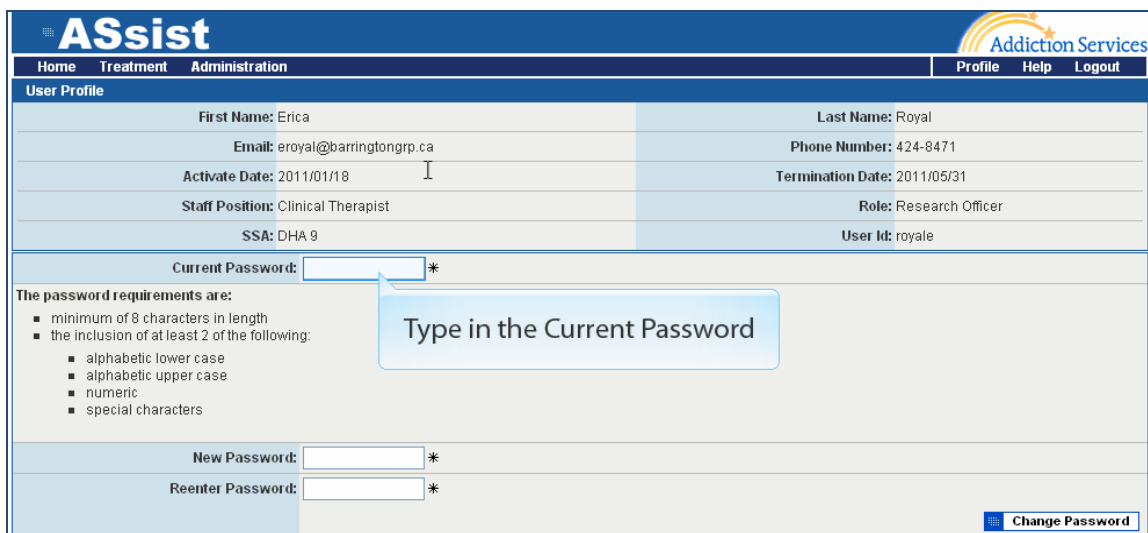
Password: *

Login

Click the **Login** button.

If this is the first time ASsist has been logged into, a change of password will be required. To change the password, perform the following.

1. Type in the current password in the **Current Password** field.



ASsist Addiction Services

Home Treatment Administration Profile Help Logout

User Profile

First Name: Erica	Last Name: Royal
Email: eroyal@barringtongrp.ca	Phone Number: 424-8471
Activate Date: 2011/01/18	Termination Date: 2011/05/31
Staff Position: Clinical Therapist	Role: Research Officer
SSA: DHA 9	User Id: royale

Current Password: *

The password requirements are:

- minimum of 8 characters in length
- the inclusion of at least 2 of the following:
 - alphabetic lower case
 - alphabetic upper case
 - numeric
 - special characters

Type in the Current Password

New Password: *

Reenter Password: *

Change Password

2. Type in the new password in the **New Password** field.

AAssist Addiction Services

Home Treatment Administration Profile Help Logout

User Profile

First Name: Erica	Last Name: Royal
Email: eroyal@barringtongrp.ca	Phone Number: 424-8471
Activate Date: 2011/01/18	Termination Date: 2011/05/31
Staff Position: Clinical Therapist	Role: Research Officer
SSA: DHA 9	User Id: royale

Current Password: *

The password requirements are:

- minimum of 8 characters in length
- the inclusion of at least 2 of the following:
 - alphabetic lower case
 - alphabetic upper case
 - numeric
 - special characters

New Password: *

Reenter Password:

Type in the new password

3. Type in the new password a second time in the **Reenter Password** field.

AAssist Addiction Services

Home Treatment Administration Profile Help Logout

User Profile

First Name: Erica	Last Name: Royal
Email: eroyal@barringtongrp.ca	Phone Number: 424-8471
Activate Date: 2011/01/18	Termination Date: 2011/05/31
Staff Position: Clinical Therapist	Role: Research Officer
SSA: DHA 9	User Id: royale

Current Password: *

The password requirements are:

- minimum of 8 characters in length
- the inclusion of at least 2 of the following:
 - alphabetic lower case
 - alphabetic upper case
 - numeric
 - special characters

New Password: *

Reenter Password:

Type in the new password a second time

NOTE: A password must meet the requirements set by Addiction Services:

- Minimum of 8 characters in length.
- The inclusion of at least 2 of the following:
 - Alphabetic lower case;
 - Alphabetic upper case;
 - Numeric; and,
 - Special characters.

4. Click the **Change Password** button.

The screenshot shows the ASsist User Profile page. The top navigation bar includes 'Home', 'Treatment', 'Administration', 'Profile', 'Help', and 'Logout'. The 'User Profile' section displays user information: First Name: Erica, Last Name: Royal, Email: eroyal@barringtongrp.ca, Phone Number: 424-8471, Activate Date: 2011/01/18, Termination Date: 2011/05/31, Staff Position: Clinical Therapist, Role: Research Officer, SSA: DHA 9, and User Id: royale. Below this is the 'Current Password' field with a masked password and an asterisk. The 'The password requirements are:' section lists: minimum of 8 characters in length, and the inclusion of at least 2 of the following: alphabetic lower case, alphabetic upper case, numeric, and special characters. There are 'New Password' and 'Reenter Password' fields, both masked with asterisks. A blue callout box with a hand icon pointing to the 'Change Password' button at the bottom right says 'Click the Change Password button'.

NOTE: If you forget your password, you must contact the QMC/RSO or PAA to provide you with a new password. Steps 1-5 will be repeated.

5.3 Home Page and General ASsist Navigation

After successful login, the **Home Page** is displayed.

The screenshot shows the ASsist Home Page. The top navigation bar includes 'Home', 'P&CE', 'Treatment', 'Administration', 'Profile', 'Help', and 'Logout'. The 'Welcome' section displays the user's name 'Glenn Dahlgren', the version 'Version 2.0.4', and the date 'Thu, Oct 8, 2009'. The 'ASsist - Addiction Services Statistical Information System Technology' section lists the main objectives of the system: To provide information so we can better meet our clients needs; To be able to readily report on our standards and accountabilities; and To reduce the manual processes currently required for programming and funding. It also states that ASsist is capable of collecting information related to intake and referrals, registration, tracking of appointments and groups, and discharge. There are two sections for 'To Do List...' and 'Wait and Active Client Caseload List...', both showing 'no entries'. The right sidebar contains 'Knowledge Centers' with a link to 'ASsist', 'Resources' with links to 'Privacy Training' and 'Release Notes', and 'Links' with links to 'Addiction Services' and 'Health Promotion'.

5.3.1 Profile Button

The profile is where the current user's information is stored. To view it, follow these steps.

1. Click the **Profile** button.

The screenshot shows the ASsist home page. The top navigation bar includes 'Home', 'Treatment', 'Administration', 'Profile', 'Help', and 'Logout'. The 'Profile' button is highlighted with a blue callout box that says 'Click the Profile button'. The main content area displays a welcome message for Erica Royal, version 2.0.4, dated Mon, Jan 24, 2011. It also lists the main objectives of the system and provides links to 'Knowledge Centers', 'Resources', and 'Links'.

2. The ASsist User Profile Page appears.

The screenshot shows the ASsist User Profile page. The top navigation bar is the same as the home page. The 'User Profile' section displays the following information:

First Name: Erica	Last Name: Royal
Email: eroyal@barringtongrp.ca	Phone Number: 424-8471
Activate Date: 2011/01/18	Termination Date: 2011/05/31
Staff Position: Clinical Therapist	Role: Research Officer
SSA: DHA 9	User Id: royale

Below this information is a 'Current Password' field with a '*' icon. The password requirements are listed:

- minimum of 8 characters in length
- the inclusion of at least 2 of the following:
 - alphabetic lower case
 - alphabetic upper case
 - numeric
 - special characters

At the bottom, there are 'New Password' and 'Reenter Password' fields, both with '*' icons. A 'Change Password' button is located in the bottom right corner.

5.3.2 Help Button

The Help button links to specific help functionality for ASsist.

ASsist - Addiction Services Statistical Information System

The main objectives of the system are:

- To provide information so we can better meet our clients needs;
- To be able to readily report on our standards and accountabilities;
- To reduce the manual processes currently required for programming and funding.

ASsist is capable of collecting information related to intake and referrals, registration, tracking of appointments and groups, and discharge.

To Do List... - no entries

Date	Subject	Initiated by	Actions
There are no entries on your To Do list.			

Wait and Active Client Caseload List... - 2 items

Client Name	Case No	Status
ABCDEFG, ZABCD		registration
ABCDEFG, ZABCD		registration

Resources

- [Privacy Training](#)
- [Release Notes](#)

Links

- [Addiction Services](#)
- [Health Promotion](#)

5.3.3 Logout Button (and Timing out)

When finished using the ASsist application, logout of the application to safeguard private information (see ASsist Privacy Training for procedures on appropriate use of the system).

1. To logout of ASsist, click the **Logout** button.

ASsist - Addiction Services Statistical Information System

The main objectives of the system are:

- To provide information so we can better meet our clients needs;
- To be able to readily report on our standards and accountabilities;
- To reduce the manual processes currently required for programming and funding.

ASsist is capable of collecting information related to intake and referrals, registration, tracking of appointments and groups, and discharge.

To Do List... - no entries

Date	Subject	Initiated by	Actions
There are no entries on your To Do list.			

Wait and Active Client Caseload List... - 2 items

Client Name	Case No	Status
ABCDEFG, ZABCD		registration
ABCDEFG, ZABCD		registration

Resources

- [Privacy Training](#)
- [Release Notes](#)

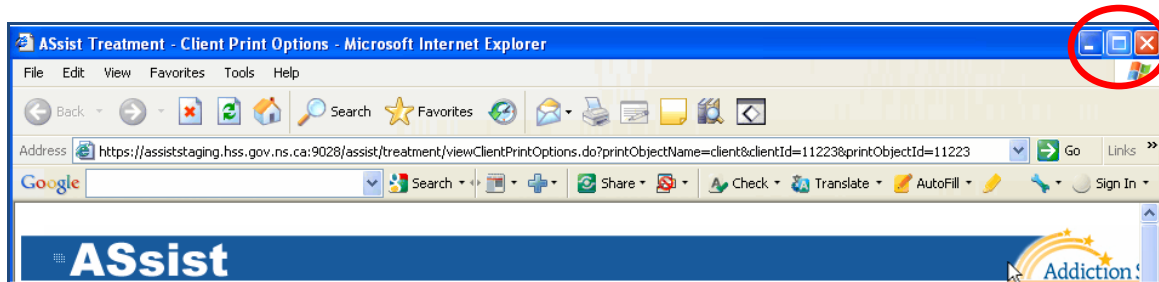
Links

- [Addiction Services](#)
- [Health Promotion](#)

ASsist will time out the session automatically after 30 minutes of inactivity. Warning messages at set intervals will be displayed indicating the amount of time remaining in the session prior to a time out. The system will also give an alert message if the session is timed out. See examples of time out messages below.

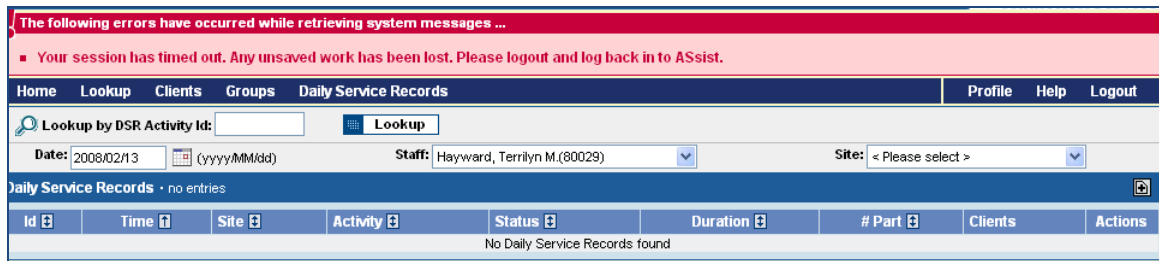
NOTE:

- Closing the web browser by using the “X” button in the upper right hand corner (shown in the following screenshot) does not log a user out, and he/she is still technically logged in until 30 minutes of inactivity has passed. Do **not** close out of ASsist using the button indicated here.



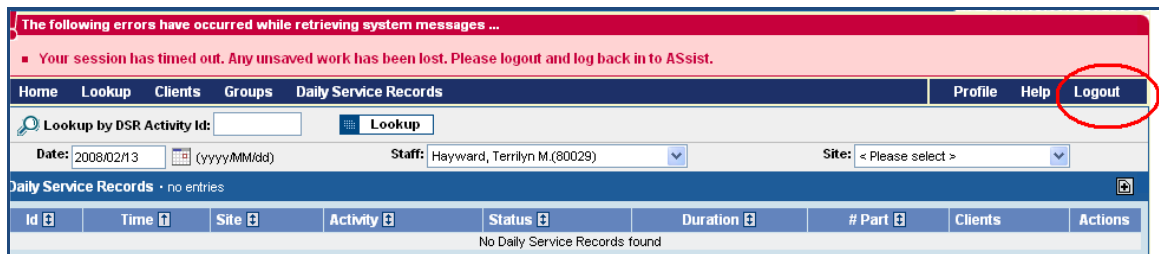
- Typing text into the field ‘text boxes’ does not count as activity. To avoid losing important information, frequently click the **Save** button.

If a session has timed out, the following screen will be displayed.

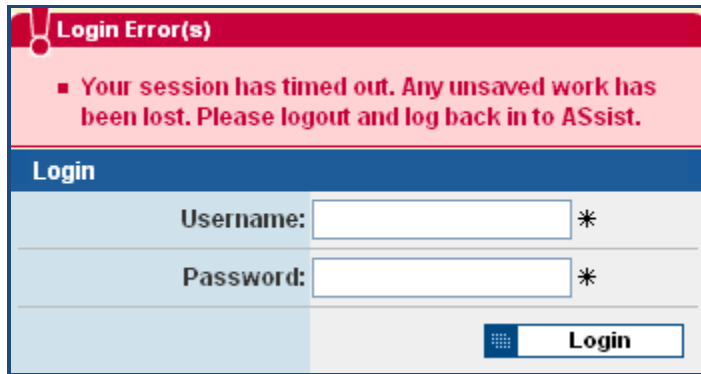


To log back into ASsist, perform the following steps.

1. Click the **Logout** button (circled in this screenshot):



The Login screen will be displayed with the following message.



The screenshot shows a web interface with a red header bar containing a warning icon and the text "Login Error(s)". Below this, a red message box states: "■ Your session has timed out. Any unsaved work has been lost. Please logout and log back in to ASsist." Underneath the message is a blue "Login" header. The login form consists of two rows: "Username:" followed by a text input field and an asterisk, and "Password:" followed by a text input field and an asterisk. At the bottom right of the form is a blue button with a grid icon and the text "Login".

2. Log back in to ASsist and reenter any unsaved work that has been lost due to the session time out.

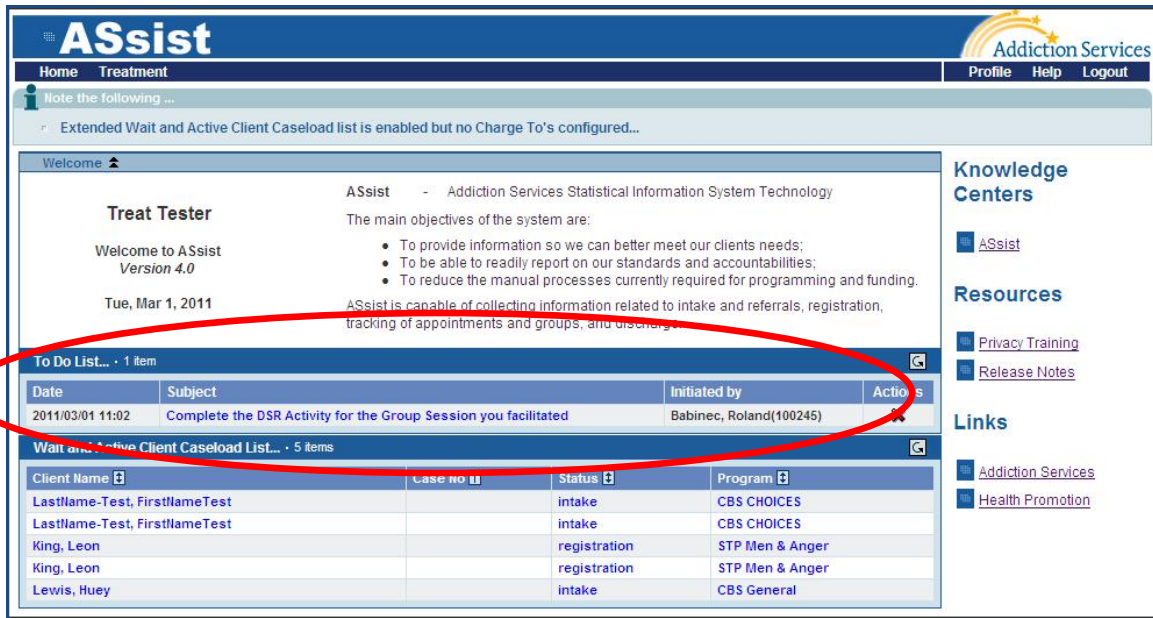
5.3.4 To Do List and Wait and Active Client Caseload List

The Home Page provides information including the **To Do List**, and the **Wait and Active Client Caseload List**. To view the details of any outstanding item on the To Do List, or to view the details of a client found on the Wait and Active Client Caseload List, click on the desired item.

To-Do List

The To-Do List can be access from the ASsist Home Page. The To-Do List is a list of tasks that are required to be completed by the ASsist user. For example, for a group session with more than one facilitator, one person creates the group in ASsist and identifies the other facilitators on that group. The system would automatically create a Daily Service Record and place it on the to-do list for the co-facilitators of that group.

The following screen shot is a To-Do List on the home screen.



ASsist
Addiction Services Statistical Information System Technology

Home Treatment Profile Help Logout

Note the following ...
Extended Wait and Active Client Caseload list is enabled but no Charge To's configured...

Welcome
Treat Tester
Welcome to ASsist
Version 4.0
Tue, Mar 1, 2011

ASsist - Addiction Services Statistical Information System Technology
The main objectives of the system are:

- To provide information so we can better meet our clients needs;
- To be able to readily report on our standards and accountabilities;
- To reduce the manual processes currently required for programming and funding.

ASsist is capable of collecting information related to intake and referrals, registration, tracking of appointments and groups, and discharge.

To Do List... 1 item

Date	Subject	Initiated by	Actions
2011/03/01 11:02	Complete the DSR Activity for the Group Session you facilitated	Babinec, Roland(100245)	

Wait and Active Client Caseload List... 5 items

Client Name	Case No.	Status	Program
LastName-Test, FirstNameTest		intake	CBS CHOICES
LastName-Test, FirstNameTest		intake	CBS CHOICES
King, Leon		registration	STP Men & Anger
King, Leon		registration	STP Men & Anger
Lewis, Huey		intake	CBS General

Knowledge Centers
ASsist

Resources
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Wait and Active Client Caseload List

The Wait and Active Client Caseload List allows quick access to all current active clients assigned to the specific ASsist user. This section shows treatment providers the list of clients currently assigned to them; either clients waiting for treatment (Open Intake only) or receiving treatment (Open Registration). Click on the **Client Name**, **Case No.**, or **Status**, and the system will open the client's profile.

Note the following ways a client will be found on your Wait and Active Caseload List.

- Intake.
 - The client will appear on the list belong to the person indicated in the **Intake Assigned To** field; or
 - If the **Intake Assigned To** field is blank, the client will be found on the staff member whose name in the **Intake Completed By** field; or
 - If the **Intake Assigned To** and **Intake Completed By** fields contain different names, the client will appear on the Wait and Active Case Load List for the staff member whose name is in the **Intake Assigned To** field; and
- Open Program Registration.
 - The client will appear on the list for the staff member whose name is indicated in the **Primary Staff** field; or
 - If the **Primary Staff** field is blank, the client will be found on the list for the staff member whose name in the **Registration Staff** field; or
 - If the **Primary Staff** and **Registration Staff** fields contain different names, the client will appear on the Wait and Active Case Load List for the staff member whose name is in the **Primary Staff** field; and,

- There is a special rule applied if the registration program name or an intake recommended program is a **Primary Care Program**. In this case, the client name will be found on the Wait and Active Caseload list for all staff assigned to work on the unit.

The following screen shot shows an example of a Wait and Active Caseload list with three clients in it.

The screenshot shows the ASsist web application interface. The top navigation bar includes 'Home', 'Treatment', 'Profile', 'Help', and 'Logout'. The main content area displays a welcome message for Terrilyn Hayward and a list of system objectives. Below this, there is a 'To Do List' section with no entries. The 'Wait and Active Client Caseload List' section shows three clients:

Client Name	Case No	Status
Brewster, Punky	0700222	intake
Simpson, Homer	0600222	registration
Spears, Brittney	0700111	registration

The right sidebar contains links to 'Knowledge Centers', 'Resources', and 'Links'.

5.4 Changing the Password

From the profile page, the current password can be changed. To change the password, first go to the **Profile** page from the home screen.

- Click the **Profile** button.

The screenshot shows the ASsist web application interface with the 'Profile' page selected. The top navigation bar includes 'Home', 'Treatment', 'Administration', 'Profile', 'Help', and 'Logout'. The main content area displays a welcome message for Erica Royal and a list of system objectives. A callout box with the text 'Click the Profile button' points to the 'Profile' button in the top navigation bar. The 'To Do List' and 'Wait and Active Client Caseload List' sections both show no entries.

- Type in the current password in the **Current Password** field.

AsSist Addiction Services

Home Treatment Administration Profile Help Logout

User Profile

First Name: Erica	Last Name: Royal
Email: eroyal@barringtongrp.ca	Phone Number: 424-8471
Activate Date: 2011/01/18	Termination Date: 2011/05/31
Staff Position: Clinical Therapist	Role: Research Officer
SSA: DHA 9	User Id: royale

Current Password: *

The password requirements are:

- minimum of 8 characters in length
- the inclusion of at least 2 of the following:
 - alphabetic lower case
 - alphabetic upper case
 - numeric
 - special characters

New Password: *

Reenter Password: *

[Change Password](#)

3. Type in the new password in the **New Password** field.

AsSist Addiction Services

Home Treatment Administration Profile Help Logout

User Profile

First Name: Erica	Last Name: Royal
Email: eroyal@barringtongrp.ca	Phone Number: 424-8471
Activate Date: 2011/01/18	Termination Date: 2011/05/31
Staff Position: Clinical Therapist	Role: Research Officer
SSA: DHA 9	User Id: royale

Current Password: *

The password requirements are:



- minimum of 8 characters in length
- the inclusion of at least 2 of the following:
 - alphabetic lower case
 - alphabetic upper case
 - numeric
 - special characters

New Password: *

Reenter Password: *

[Change Password](#)

4. Type in the new password a second time in the **Reenter Password** field.

[Home](#)
[Treatment](#)
[Administration](#)

[Profile](#)
[Help](#)
[Logout](#)

User Profile

First Name: Erica	Last Name: Royal
Email: eroyal@barringtongrp.ca	Phone Number: 424-8471
Activate Date: 2011/01/18	Termination Date: 2011/05/31
Staff Position: Clinical Therapist	Role: Research Officer
SSA: DHA 9	User Id: royale


Current Password: *

The password requirements are:

- minimum of 8 characters in length
- the inclusion of at least 2 of the following:
 - alphabetic lower case
 - alphabetic upper case
 - numeric
 - special characters

New Password: *

Reenter Password: *





Type in the new password a second time

NOTE: A password must meet the requirements set by Addiction Services:

- Minimum of 8 characters in length.
- The inclusion of at least 2 of the following:
 - Alphabetic lower case;
 - Alphabetic upper case;
 - Numeric; and/or
 - Special characters.

5. Click the **Change Password** button.

[Home](#)
[Treatment](#)
[Administration](#)

[Profile](#)
[Help](#)
[Logout](#)

User Profile

First Name: Erica	Last Name: Royal
Email: eroyal@barringtongrp.ca	Phone Number: 424-8471
Activate Date: 2011/01/18	Termination Date: 2011/05/31
Staff Position: Clinical Therapist	Role: Research Officer
SSA: DHA 9	User Id: royale

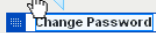
Current Password: *

The password requirements are:

- minimum of 8 characters in length
- the inclusion of at least 2 of the following:
 - alphabetic lower case
 - alphabetic upper case
 - numeric
 - special characters

New Password: *

Reenter Password: *



Click the Change Password button

5.5 Knowledge Center

On the Home Page, the **Knowledge Center** is displayed on the right. The Knowledge Centre includes detailed information regarding the ASsist application, Privacy Training, Release Notes, as well as Links to Addiction Services and Health Promotion and Protection websites.

When accessing the Knowledge Center and other resources, the ASsist Home Page will remain visible, and work can be continued in the application, even when browsing through the reference materials.

5.5.1 ASsist Link

Click the ASsist Link to access many resources such as training videos, manuals, and paper-based forms.

ASsist

Home Treatment Profile Help Logout

Welcome

Heather Reeves

Welcome to ASsist
Version 2.0.4
Fri, Feb 4, 2011

ASsist - Addiction Services Statistical Information System Technology

The main objectives of the system are:

- To provide information so we can better meet our clients needs;
- To be able to readily report on our standards and accountabilities;
- To reduce the manual processes currently required for programming and funding.

ASsist is capable of collecting information related to intake, tracking of appointments and groups, and discharge.

To Do List... - no entries

Date	Subject	Initiated by
There are no entries on your To Do list.		

Wait and Active Client Caseload List... - 2 items

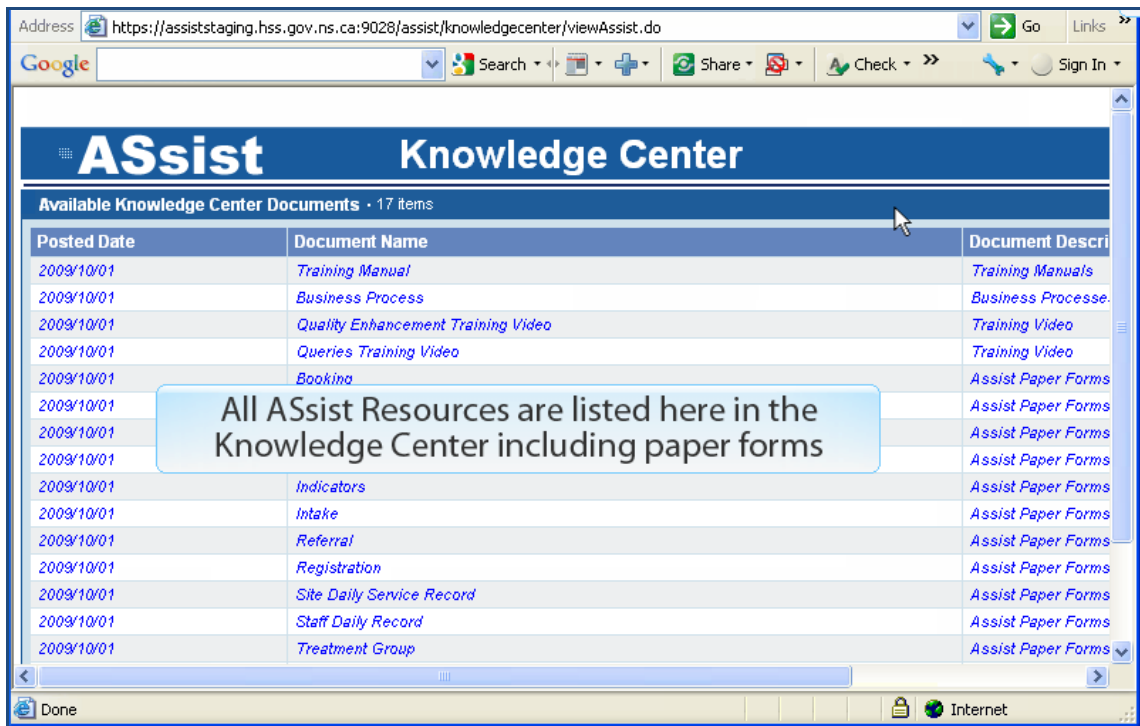
Client Name	Case No	Status
ABCDEFG, ZABCD		registration
ABCDEFG, ZABCD		registration

Knowledge Centers

- [ASsist](#)
- [Privacy Training](#)
- [Release Notes](#)
- [Addiction Services](#)
- [Health Promotion](#)

Click the ASsist button to access ASsist resources such as training videos, manuals, and paper forms.

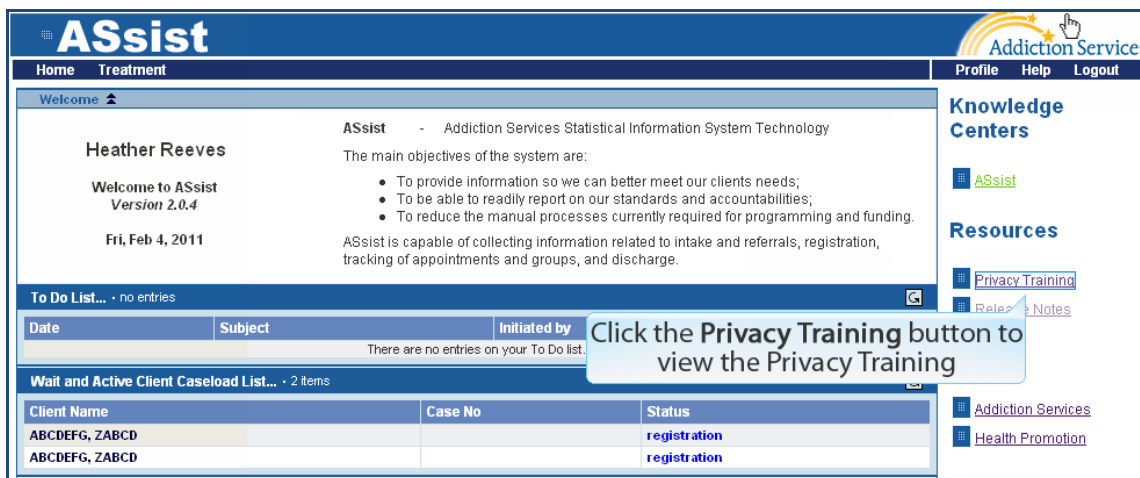
The following screen will be displayed.



This window includes the date when the document was posted, the document name, and a document description. To view a document, click on it. When finished with this area, simply close the window.

5.5.2 Privacy Training

Click the Privacy Training link to view the privacy training.



The Privacy Training PowerPoint presentation appears.



Click on a slide to advance the presentation to the next slide.

5.5.3 Release Notes

Release Notes (information on upgrades to ASsist) can be accessed by clicking on the Release Notes link.

ASsist - Addiction Services Statistical Information System Technology

The main objectives of the system are:

- To provide information so we can better meet our clients needs;
- To be able to readily report on our standards and accountabilities;
- To reduce the manual processes currently required for programming and funding.

ASsist is capable of collecting information related to intake and referrals, registration, tracking of appointments and groups, and discharge.

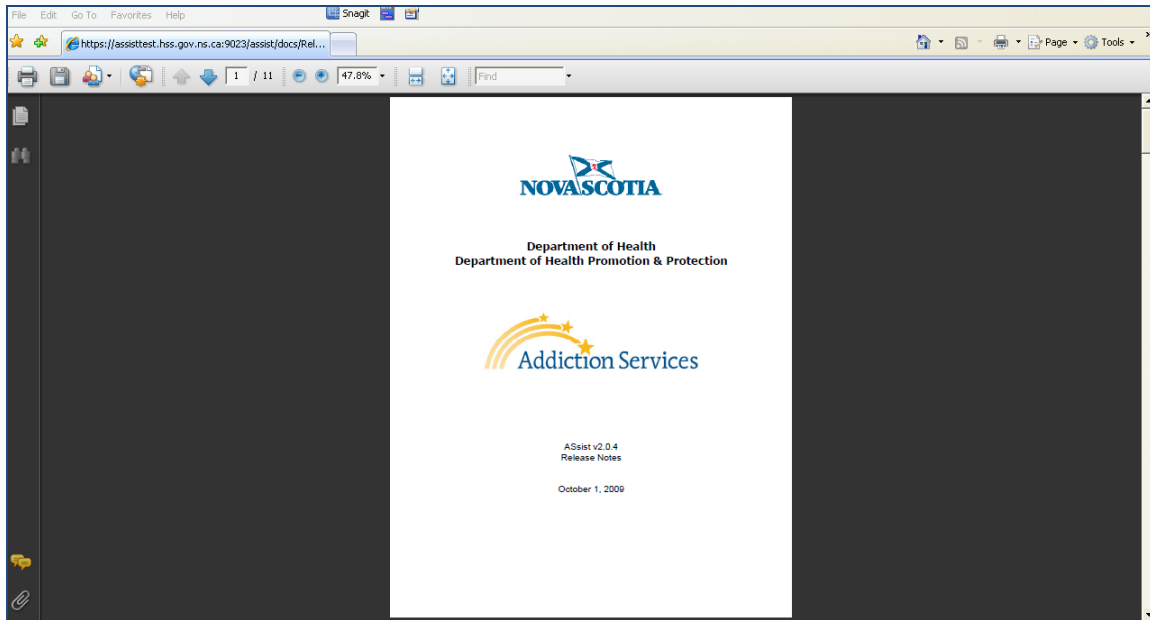
Resources

- [Privacy Training](#)
- [Release Notes](#)

Wait and Active Client Caseload List... • 2 items

Client Name	Case No	Status
ABCDEF, ZABCD		registrat
ABCDEF, ZABCD		registrat

The release notes will be displayed.



5.5.4 Links

The links section of the ASsist home page contains links to the current provincial websites including Addiction Services and Nova Scotia Health and Wellness. These provincial websites can be accessed by clicking on these links.

ASsist - Addiction Services Statistical Information System Technology

The main objectives of the system are:

- To provide information so we can better meet our clients needs;
- To be able to readily report on our standards and accountabilities;
- To reduce the manual processes currently required for programming and funding.

ASsist is capable of collecting information related to intake and referrals, registration, tracking of appointments and groups, and discharge.

To Do List... - no entries

Date	Subject	Initiated by	Actions
There are no entries on your To Do list.			

Wait and Active Client Caseload List... - 2 items

Client Name	Case No	Status
ABCDEFG, ZABCD		registration
ABCDEFG, ZABCD		

Links

- [Addiction Services](#)
- [Health Promotion](#)

Provincial websites can be accessed by clicking on the links shown here.

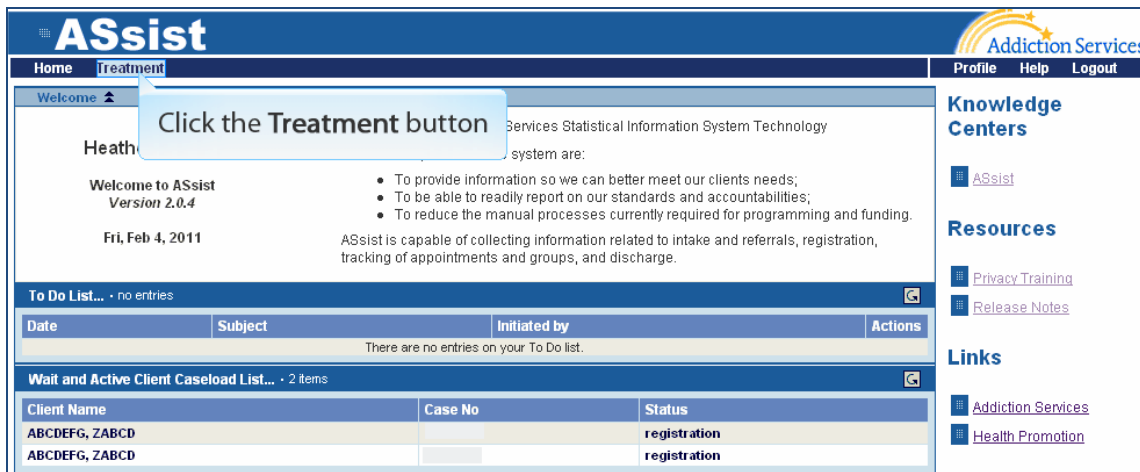
5.6 Client Lookup

Pre Requisite: Logged into application

Perform a Client Lookup for all clients interacted with; new and current. For a new client, a Client Lookup is performed in order to ensure a Case Number does not already exist in the application and to avoid creating duplicate clients.

The following steps outline how to perform a **Client Lookup**.

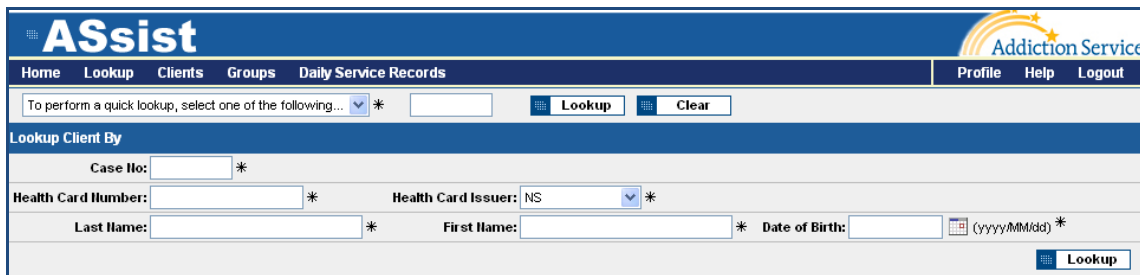
1. From the Home page, click on the **Treatment** button.



The screenshot shows the ASsist Home page. The 'Treatment' button in the top navigation bar is highlighted with a blue box and a callout that says 'Click the Treatment button'. The page includes a welcome message, a 'To Do List' section with no entries, and a 'Wait and Active Client Caseload List' table.

Client Name	Case No	Status
ABCDEFG, ZABCD		registration
ABCDEFG, ZABCD		registration

The **Lookup** page will display.



The screenshot shows the ASsist Lookup page. It features a search bar with a dropdown menu and a 'Lookup' button. Below the search bar, there are fields for 'Case No:', 'Health Card Number:', 'Health Card Issuer:', 'Last Name:', 'First Name:', and 'Date of Birth:'. A 'Lookup' button is located at the bottom right of the form.

NOTE:

The cursor is automatically defaulted to the **Case No.** field.

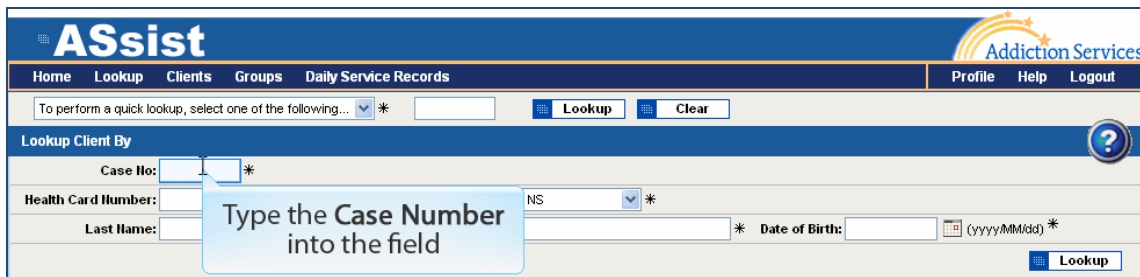
A search can be performed by using the following methods.

- a. Case Number (or by using the 8-digit StatIS number in the Case Number field);
- b. Health Card Number and Issuer; or,
- c. First Name, Last Name and Date of Birth.

5.6.1 Client Lookup using the Case Number

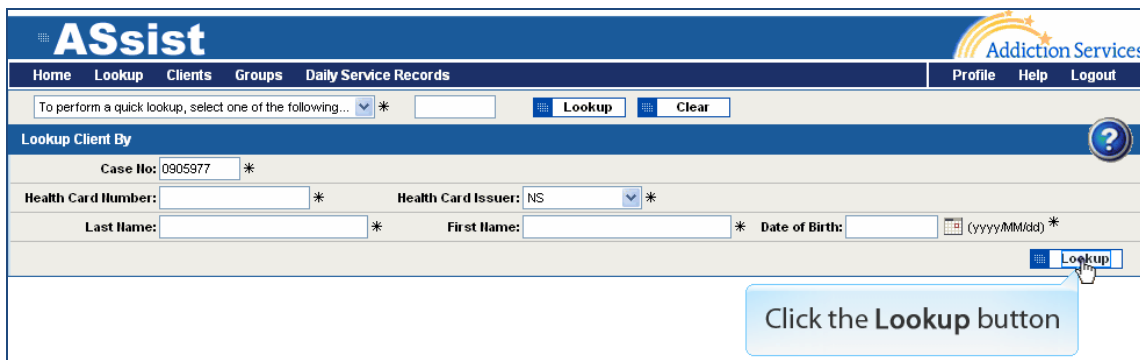
The case number must be entered in the **Case No** field on the screen. The case number is either the 7-digit ASsist Case Number assigned to the client or the 8 digit StatIS number (region code plus 6 digit number).

1. Type the Case Number into the **Case No.** field.



The screenshot shows the ASsist web application interface. The top navigation bar includes 'Home', 'Lookup', 'Clients', 'Groups', and 'Daily Service Records'. A secondary bar contains 'Profile', 'Help', and 'Logout'. Below the navigation, there is a search prompt: 'To perform a quick lookup, select one of the following...' followed by a dropdown menu and a search icon. The main section is titled 'Lookup Client By' and contains several input fields: 'Case No:' (with a callout box saying 'Type the Case Number into the field'), 'Health Card Number:', 'Last Name:', 'Health Card Issuer:' (with a dropdown menu set to 'NS'), and 'Date of Birth:' (with a date picker). A 'Lookup' button is located at the bottom right of the form.

2. Click the **Lookup** button.



This screenshot shows the same ASsist web application interface, but with the 'Case No:' field populated with the value '0905977'. The 'Health Card Issuer:' dropdown menu is also set to 'NS'. A callout box with an arrow points to the 'Lookup' button, with the text 'Click the Lookup button'.

The **ASsist Treatment-Clients** page appears.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Case No: Lookup by Client Id: Lookup Clear

Client

Case No: 0905977 Old Stat's Case Numbers:

Last Name: ABC DEFGHI * First Name: ZABCD * Middle Name: DEFGHIJK LMNOPQR

Last Name at Birth: Alias/Goes By:

Gender: Male Age: 25

Contact Phone: 234-567-8901 Phone Call Allowed Message Allowed

Health Card Number: 10000905977 * Health Card Expiry Date: (yyyy/MM/dd)

Health Card Issuer: Other * Issuer Description:

Collection Staff: Poirier, Maureen(1036) * Collection Date: 2010/02/19 (yyyy/MM/dd) *

Client initially heard about service from: Health Professional Other

Address

Mailing Address: 89 QRSTU VWXYZ A 911/Civic Address: PQRS UVW Postal Code: A1A A1A

Province: Nova Scotia County: Cape Breton Home Community: Glace Bay

Contacts

Home Phone: Phone Call Allowed Message Allowed

5.6.2 Client Lookup Using the Health Card Number and Issuer

The **Health Card Number** field requires the 11-digit Health Card Number assigned to the client by the province of Nova Scotia.

1. Enter the client's 11-digit Health Card Number in the **Health Card Number** field.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

To perform a quick lookup, select one of the following... * Lookup Clear

Lookup Client By

Case No: *

Health Card Number: * Health Card Issuer: NS * Date of Birth: (yyyy/MM/dd) *

Last Name: Lookup

Enter the client's 11-digit health card number into the Health Card Number field

The **Health Card Issuer** field is also required, and it is defaulted to Nova Scotia (NS). It only requires changing when the health card has been issued outside of Nova Scotia.

2. Click on the drop-down button next to the **Health Card Issuer** field to display the list of options.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

To perform a quick lookup, select one of the following... *

Lookup Client By ?

Case No: *

Health Card Number: 10000905977 * Health Card Issuer: NS *

Last Name: * First Name: * (yyyy/MM/dd) *

Click the drop down button next to the Health Card Issuer field

3. Select the appropriate Health Card Issuer from the drop down list. In this example, the issuer chosen is **Other**.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

To perform a quick lookup, select one of the following... *

Lookup Client By ?

Case No: *

Health Card Number: 10000905977 * Health Card Issuer: NS *

Last Name: * First Name: * Date of Birth: * (yyyy/MM/dd) *

NS
AB
Armed Forces
BC
Federal Inmate
MB
NB
NL
NT
NU
ON
PE
QC
RCMP
SK
To be Assigned
YT
Other
Conversion

Select appropriate Issuer from the drop-down list.

5.6.3 Client lookup using Last Name, First Name, and Date of Birth

Looking up a client using the name fields and the date of birth are based on EXACT MATCHES. Spelling must exactly match the spelling used when the client was originally entered into ASsist. Date of birth is also required.

1. Type in the last name of the client in the **Last Name** field.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

To perform a quick lookup, select one of the following... * Lookup Clear

Lookup Client By ?

Case No: *

Health Card Number: * Health Card Issuer: NS *

Last Name: * First Name: * Date of Birth: (yyyy/MM/dd) *

Lookup

Type the Last Name of the client into the **Last Name** field

2. Type in the first name of the client into the **First Name** field.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

To perform a quick lookup, select one of the following... * Lookup Clear

Lookup Client By ?

Case No: *

Health Card Number: * Health Card Issuer: NS *

Last Name: ABC DEFGHI * First Name: ZABCD * Date of Birth: (yyyy/MM/dd) *

Lookup

Type the First Name of the client into the **First Name** field

3. Enter the client's date of birth into the **Date of Birth** field. It must be in the format must be YYYY/MM/DD.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

To perform a quick lookup, select one of the following... * Lookup Clear

Lookup Client By ?

Case No: *

Health Card Number: * Health Card Issuer: NS *

Last Name: ABC DEFGHI * First Name: ZABCD * Date of Birth: 1985/ (yyyy/MM/dd) *

Lookup

Enter the client's Date of Birth into the **Date of Birth** field.
It must be in the format of YYYY/MM/DD

4. Click the **Lookup** button.

5.6.4 Client lookup – Expanded Search Functionality

While searching for an existing client, it is possible that multiple clients have the same first and last name, and date of birth. If this happens, a message will be displayed indicating that there are too many results. ASsist then prompts the user to narrow the search by entering further information to lookup the unique client.

The error message indicating that the search yielded too many results is displayed.

To narrow the search, follow these steps.

1. Type additional search criteria to narrow down the results.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

The following errors must be corrected ...

- Too many results

To perform a quick lookup, select one of the following... *

Lookup Client By

Case No: *

Health Card Number: * Health Card Issuer: NS *

Last Name: Pan * First Name: Peter * Date of Birth: 1953/02/05 (yyyy/MM/dd) *

Multiple clients have been found, please narrow your search...

Middle Name: Home Phone: Gender: < Please select >

Type in additional search criteria to narrow down the search results

A Middle Name, Home Phone Number and/or Gender can be used to narrow the search. In this example, the **Home Phone** number is used to narrow down the search.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

The following errors must be corrected ...

- Too many results

To perform a quick lookup, select one of the following... *

Lookup Client By

Case No: *

Health Card Number: * Health Card Issuer: NS *

Last Name: Pan * First Name: Peter * Date of Birth: 1953/02/05 (yyyy/MM/dd) *

Multiple clients have been found, please narrow your search...

Middle Name: Home Phone: 902- Gender: < Please select >

In this example, the Home Phone number is used to narrow the search.

2. When the additional search criteria have been entered, click the **Lookup** Button.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

The following errors must be corrected ...

- Too many results

To perform a quick lookup, select one of the following... *

Lookup Client By

Case No: *

Health Card Number: * Health Card Issuer: NS *

Last Name: Pan * First Name: Peter * Date of Birth: 1953/02/05 (yyyy/MM/dd) *

Multiple clients have been found, please narrow your search...

Middle Name: Home Phone: 902-555-5555 Gender: < Please select >

Click the Lookup button

If the expanded search is successful, the client details will populate on the Client Profile Screen.

If the user is unable to narrow the lookup, the Research and Statistical Officer or ASsist Administrator should be contacted to retrieve the correct client record.

NOTE:

To lookup a client using different name variations, the client's Last Name at Birth or Alias may be typed in the Last Name and First Name fields respectively.

5.6.5 Client Found

If the search is successful, the client details will populate on the client profile screen, as shown here.

The screenshot displays the ASsist Client Profile screen. The header includes the ASsist logo and navigation links: Home, Lookup, Clients, Groups, Daily Service Records, Profile, Help, and Logout. Below the header is a search bar with fields for 'Lookup by Case No:' and 'Lookup by Client Id:', along with 'Lookup' and 'Clear' buttons. The main section is titled 'Client' and contains a form with the following fields:

- Case No: 0600321
- Old Stat\$ Case Numbers:
- Last Name: Trial0600321 *
- First Name: Test0600321 *
- Middle Name: UKL
- Last Name at Birth:
- Alias/Goes By:
- Gender: Female *
- Date of Birth: 1972/11/15 (yyyy/MM/dd) *
- Age: 36
- Contact Phone: 902-555-1212
- Phone Call Allowed: ☒
- Message Allowed: ☒
- Health Card Number: 10000600321 *
- Health Card Expiry Date: 2012/06/30 (yyyy/MM/dd)
- Health Card Issuer: Other *
- Issuer Description:
- Collection Staff: (Power, Devon(1922)) *
- Collection Date: 2006/02/07 (yyyy/MM/dd) *
- Client initially heard about service from: < Please select >
- Address section:
 - Mailing Address: 44 Trial Test
 - 911/Civic Address: 44 Trial Test
 - Postal Code: b1b 2b2
 - Province: Nova Scotia
 - County: Cape Breton
 - Home Community: New Victoria
- Contacts section:

5.6.6 Client not found:

If a client is not found, a message will appear at the top of the screen another lookup can be performed.

5.6.7 Alternative Client Lookup

Pre Requisite: Logged into application

For existing clients only, perform a lookup by executing the following:

1. From the Home page, click on the **Treatment** button.
2. Click on the **Client** button.

The Client Screen will display.

3. Type in the search criteria to locate the client in ASsist.
 - a. In the **Lookup by Case No.** field, enter the 7-digit ASsist Case Number or the 8 digit StatIS number (region code plus 6 digit number); or,
 - b. In the **Lookup by Client Id** field, enter in the Client ID.

4. Click the **Lookup** button.

If the search is successful, the client will populate on the Client Profile Screen.

5.7 Creating a new Case Number in ASsist

If the client does not already exist in the database, proceed to create a new client by clicking the **New Client** button. The **New Client** button will only appear after an unsuccessful search for an existing client is performed.

1. Click the **New Client** button.

Click the New Client button

The system will open a new client profile and automatically pre-populate any information that was filled in on the lookup screen, such as the **Last Name**, **First Name**, and **Date of Birth** fields.

2. Populate the fields in on the client profile page with the correct client information.

NOTE:

Fields denoted with an asterix (*) are mandatory, and the system will prevent saving the new client until they are populated with information. The following fields are mandatory upon creation of a new client in ASsist:

- a. Last Name;
- b. First Name;
- c. Date of Birth;

- d. Health Card Number;
- e. Health Card Issuer;
- f. Health Card Expiry Date;
- g. Gender;
- h. Collection Staff; and
- i. Collection Date.

3. After all the required fields have been populated with the client information, click the **Create Case Number** button.

The screenshot shows the ASsist web application interface. The top navigation bar includes 'Home', 'Lookup', 'Clients', 'Groups', and 'Daily Service Records'. Below this is a search bar with 'Lookup by Case No:' and 'Lookup by Client Id:' fields, and 'Lookup' and 'Clear' buttons. The main form is titled 'Client' and contains various input fields for client information. A callout box with the text 'Click the Create Case Number button' points to the 'Create Case Number' button located at the bottom right of the form.

Case No:	Old StatIS Case Numbers:		
Last Name: MacDonald *	First Name: James *	Middle Name:	
Last Name at Birth:	Alias/Goes By:		
Gender: Male *	Date of Birth: 1987/10/22 (yyyy/MM/dd) *	Age:	
Contact Phone: 902- [] [] []	<input type="checkbox"/> Phone Call Allowed <input type="checkbox"/> Message Allowed		
Health Card Number: 100009059700 *	Health Card Expiry Date: (yyyy/MM/dd)		
Health Card Issuer: Other *	Issuer Description:		
Collection Staff: Reeves, Heather(100502) *	Collection Date: 2011/01/24 (yyyy/MM/dd) *		
<input type="button" value="Create Case Number"/>			
Client initially heard about service from: < Please select >			
Address			

The system will generate a case number and save the client information. Note the new case number is located at the top left of the client screen.

This screenshot shows the same ASsist web application interface after the 'Create Case Number' button has been clicked. The 'Case No.' field now displays '1100002'. A callout box with the text 'A new Case Number has been created' points to the updated 'Case No.' field.

Case No: 1100002	Old StatIS Case Numbers:		
Last Name: MacDonald *	First Name: James *	Middle Name:	
Last Name at Birth:	Alias/Goes By:		
Gender: Male *	Date of Birth: 1987/10/22 (yyyy/MM/dd) *		

5.8 Client Profile

5.8.1 Create a client profile

The previous section defined how a user could create a Case Number for a Client. The rest of the Client Profile screen contains important demographic information that should be completed prior to or at the time of Program Registration.

Pre Requisite: Logged into application, performed client lookup and on the Client screen.

Obtain client information from the client. This information includes address, contact information, as well as demographic information, for example, Marital Status or Ethnicity.

1. Fill in as many fields about the client as possible.

The screenshot shows the 'ASsist' Client Profile form. The form is divided into several sections: Client Information, Address, and Contacts. The Client Information section includes fields for Case No., Last Name, First Name, Middle Name, Date of Birth, Age, Health Card Number, and Collection Staff. The Address section includes fields for Mailing Address, 911/Civic Address, and Postal Code. The Contacts section includes fields for Home Phone and Contact Information. A blue callout box with the text 'Fill in as many fields about the client as possible.' points to the 'Collection Staff' field.

NOTE:

Any time that a client profile is reviewed, even if there are no changes, the **Collection Staff** and **Collection Date** fields should be populated to reflect the last time the information about the client had been verified by a staff member of Addiction Services.

NOTE:

For complete information specific to the fields on the client profile, including what is

expected to be fill in each one, see the Data Definitions Document. Here are some examples of how some fields should be populated, but be aware that all fields should be populated whenever possible for a more complete client profile:

- a. Health Card Number: If this is unknown at the time of creating a new client profile, the system will accept “Last Name First Name” (exactly as shown) and the issuer in this case should be “To Be Assigned”;
- b. Mailing address and civic address should both be populated with correct information. Do not use language such as “see above” or “same.” Each field needs to be detailed, even if they are the same;
- c. Current Community refers to the community that the client is currently residing, if it is different than the home address. For a typical client who is living at his or her home, this field is not required;
- d. Emergency Contact and Next of Kin contact information should be filled in with correct information. Do not use language such as “See above” or “same.” Each field needs to be detailed;
- e. The number of dependants should include both children and adult dependants;
- f. The Ethnicity field should be filled in with information provided by the client; and never assumed or guess by Addictions Staff. It is better to leave this blank than to guess;
- g. The Employment field dropdown options do not include Student or Homemaker. These are captured in the occupation field;
- h. In the Occupation field, collect the current occupation. If the client is not currently employed, collect the most recent occupation; and
- i. See section in this manual on client indicators, and populate appropriately.

2. Click on the **Save** button to save the details on the screen.

Client Indicators - no entries

Indicator	Staff	Start Date	End Date	Description	Action
There are no Indicators associated with this Client.					

General Comments

General Comments:

Characters remaining: 1500/1500

Click the **Save** button


Save

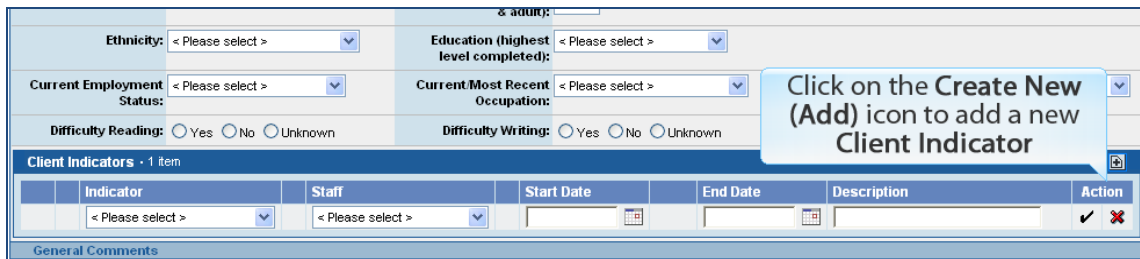
5.8.2 Client Indicators

The Client Profile screen contains important demographic information that should be completed prior to or at the time of Program Registration. A client indicator is a “Red Flag” that will show up on the top of the client profile page that indicates to staff if the client an indicator that must be known, such as a severe allergy.

To add a client indicator to a client profile, follow these steps.

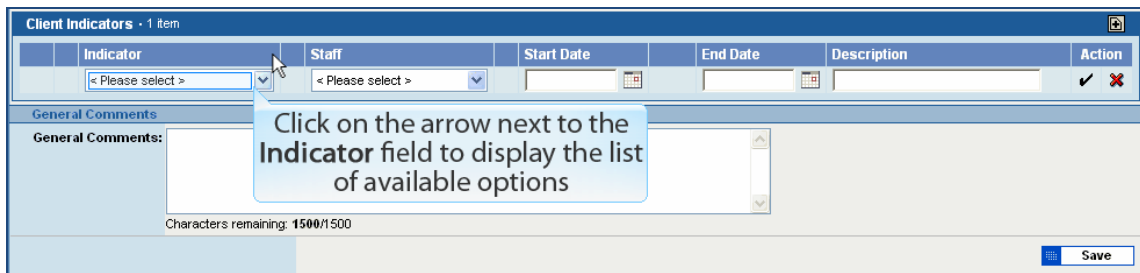
Pre Requisite: Logged into application, performed client lookup and on the Client screen.

1. Scroll down to the Client Indicator section of the Client Profile screen.
2. Click the **Create New** icon  to add a new Client Indicator to the client profile.



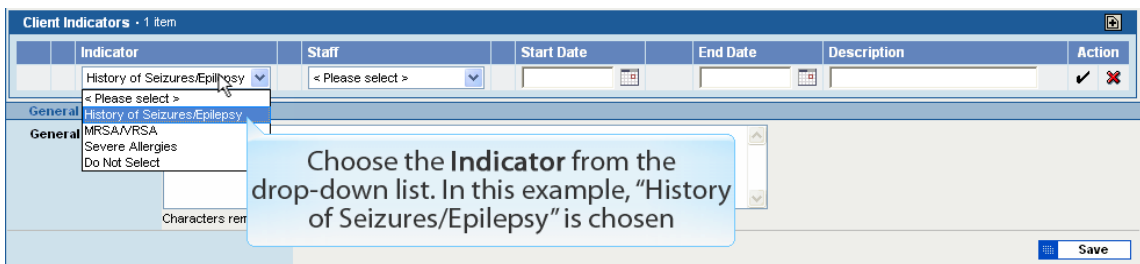
The screenshot shows the Client Profile screen with various fields for client information. A callout box with the text "Click on the Create New (Add) icon to add a new Client Indicator" points to the icon in the top right corner of the Client Indicators section.

3. Click on the arrow next to the **Client Indicator** field to display the list of available options.



The screenshot shows the Client Indicators section with the dropdown menu open. A callout box with the text "Click on the arrow next to the Indicator field to display the list of available options" points to the dropdown arrow.

4. Choose the client Indicator from the drop down list available. In this example, "History of Seizures/Epilepsy" is chosen.



The screenshot shows the Client Indicators section with the dropdown menu open and "History of Seizures/Epilepsy" selected. A callout box with the text "Choose the Indicator from the drop-down list. In this example, 'History of Seizures/Epilepsy' is chosen" points to the selected option.

NOTE:

Never use the Client Indicator dropdown list option of "Do Not Select"

5. Click on the arrow next to the **Staff** field, to display the list of available options.

Client Indicators - 1 item

Indicator	Staff	Start Date	End Date	Description	Action
History of Seizures/Epilepsy	< Please select >				✓ ✕

General Comments

General Comments:

Characters remaining: 1500/1500

Save

- Choose the appropriate person from the list. In this example, Reeves, Heather is chosen.

Client Indicators - 1 item

Indicator	Staff	Start Date	End Date	Description	Action
History of Seizures/Epilepsy	< Please select >				✓ ✕

General Comments

General Comments:

Characters remaining: 1500/1500

Save

- Select the Start Date by clicking on the small calendar next to the **Start Date** field.

Client Indicators - 1 item

Indicator	Staff	Start Date	End Date	Description	Action
History of Seizures/Epilepsy	Reeves, Heather(100502)				✓ ✕

General Comments

General Comments:

Characters remaining: 1500/1500

- Select the End Date by clicking on the small calendar next to the **End Date** field.

Client Indicators - 1 item

Indicator	Staff	Start Date	End Date	Description	Action
History of Seizures/Epilepsy	Reeves, Heather(100502)	2011/01/27			✓ ✕

General Comments

General Comments:

- Click the **Accept** icon to add the indicator to the Client Profile.

Indicator	Staff	Start Date	End Date	Description	Action
History of Seizures/Epilepsy	Reeves, Heather(100502)	2011/01/27	2011/01/27		

General Comments

General Comments:

- The blue icon indicates the client indicator has been added to the client profile successfully.

Indicator	Staff	Start Date	End Date	Description	Action
History of Seizures/Epilepsy	Reeves, Heather(100502)	2011/01/27	2011/01/27		

General Comments

General Comments:

Characters remaining: 1500/1500

5.8.3 Editing a Client Profile

A client profile can be edited at any time when located in the system.

- First, locate the client to be edited by using a Case Number, client ID or other form of search. In this example, the Case Number is used to find the client.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Case No: Lookup by Client Id:

First, locate the client to be edited. In this example, the Case Number is used to find the client.

When the client is located, the client profile will be displayed on the screen. Change the client information as required.

- Make all the necessary changes to the client profile.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Case No: Lookup by Client Id:

Client

Case No: 1100008 Old StatIS Case Numbers:

Last Name: MacDonald * First Name: Jimmy Middle Name:

Last Name at Birth: Alias/Goes By:

Gender: Male * Date of Birth: 1975/10/22 Age: 35

Contact Phone: 902- ☐ Phone Call Allowed ☐ Message Allowed

Health Card Number: 12345678901 * Health Card Expiry Date: 2012/01/26 (yyyy/MM/dd)

Health Card Issuer: Other * Issuer Description:

Make all necessary changes to the client profile

Update the **Collection Staff** and **Collection Date** fields. These fields should always reflect the last date the client's information was either updated or verified with the client.

3. Populate the **Collection Staff** field.

Health Card Number: 12345678901 * Health Card Expiry Date: 2012/01/26 (yyyy/MM/dd)

Health Card Issuer: Other * Issuer Description:

Collection Staff: Reeves, Heather(100502) * Collection Date: 2011/01/27 (yyyy/MM/dd) *

Client initially heard about service from: Social Worker

Address

Mailing Address: 123 Fake Street Postal Code: A1A2B2

Province: Nova Scotia County: Victoria Home Community: Dingwall

Populate the Collection Staff field

4. Populate the **Collection Date** field with the current date.

Health Card Number: 12345678901 * Health Card Expiry Date: 2012/01/26 (yyyy/MM/dd)

Health Card Issuer: Other * Issuer Description:

Collection Staff: Reeves, Heather(100502) * Collection Date: 2011/01/27 (yyyy/MM/dd) *

Client initially heard about service from: Social Worker

Address

Mailing Address: 123 Fake Street Postal Code: A1A2B2

Province: Nova Scotia County: Victoria Home Community: Dingwall

Populate the Collection Date field

5. Click the **Save** button.

General Comments

General Comments:

Characters remaining: 1484/1500

Click the Save button

5.8.4 Printing a Client Profile

There may be situations in which a client profile will need to be printed, however, it is important to note that ASsist records, wherever possible, should be viewed on the screen and not printed. If a client profile is to be printed, follow these steps.

1. Search for the existing client using any of the various search methods.
2. Click the **Print** button.

ASsist

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Case No: Lookup by Client Id: Lookup Clear

Client

Case No: Old StatS Case Numbers: **Click the Print Button** Print

Last Name: ABCDEFGH * First Name: ZABCD * Middle

Last Name at Birth: BCDEFGHI Alias/Goes By:

Gender: Male * Date of Birth: (yyyy/MM/dd) * Age: 41

The ASsist Treatment – Client Print Options page appears.

ASsist

Print Filter

Intake Filter

☒ All Intakes

☐ Active Intakes Only

☐ Intakes for years back

Components Filter


Select from the following components...

	Display Summary
<input checked="" type="checkbox"/> Client	
<input checked="" type="checkbox"/> List of Daily Service Record Activities	✓
<input checked="" type="checkbox"/> List of Group Sessions	✓
<input checked="" type="checkbox"/> Intake	
<input type="checkbox"/> Referral Recommendations	
<input checked="" type="checkbox"/> Program Registrations	
<input type="checkbox"/> Referral Recommendations	
<input type="checkbox"/> List of Daily Service Record Activities	✓
<input type="checkbox"/> List of Group Sessions	✓
<input type="checkbox"/> StatS Treatment History	✓

The ASsist Treatment - Client Print Options page appears

Only the client profile should be printed.

3. Deselect all the checkboxes, except for the **Client** checkbox.

ASsist 

Print Filter

Intake Filter

☒ All Intakes
☐ Active Intakes Only
☐ Intakes for years back

Components Filter

Select from the following components...

	Display Level	
	Summary	Detail
<input checked="" type="checkbox"/> Client	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> List of Daily Service Record Activities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> List of Group Sessions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Intakes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Referrals	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Program Registrations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Retention	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> List of Daily Service Record Activities	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> List of Group Sessions	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> StatIS Treatment History	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> StatIS Substance History	<input type="checkbox"/>	<input type="checkbox"/>

Deselect all checkboxes except the Client checkbox

Select each of the following...

4. Click the **Print** button.

Intake-77862, 2010/01/06 11:07 - Sydney PCU

Referral Recommendations

Transfer-14949, On: 2010/01/07, From: Sydney PCU, To: CBS General

Program Registrations

Prg Reg-56296, 2010/01/07 - 2010/01/11, Sydney PCU, Withdrawal Management Inpatient

Referral Recommendations

Transfer-14945, On: 2010/01/07, From: Sydney PCU, To: CBS General

Intake-55018, 2008/11/24 14:36 - Sydney CBS

Click the Print button

The Print Preview page appears.

ASsist Client Profile and History

ZABCD DEFGH ABCDEFGH

Case No:

Printed On:

Status: Client Closed

Personal Information

Old StatIS Case Numbers:

Last Name at Birth: BCDEFGHI **Alias/Goes By:**

Date of Birth: 41 years old **Gender:** Male

Contact Phone: **Phone call is allowed.**
Message is allowed.

Health Card Number: **Health Card Expiry Date:** 2011/08/31

Health Card Issuer: Other **Issuer Description:**

Client initially heard about service from: Family/Significant Other **OMS:** Not asked yet

Collection Staff: Graham, Margaret(1907) **Collection Date:** 2010/01/06

The Print Client page appears

The page can be printed from this screen by clicking the **Print** button at the top of the page. The page can then be printed to the printer. The user can also click the **Close** or **Back** buttons from this screen to return to the Client Profile screen.

5.8.5 Client Profile History (including StatIS History)

The client profile can be viewed on screen in ASsist. The current details for the client profile can be viewed by scrolling up and down the client profile page. In some cases, clients may have received treatment from Addiction Services prior to the implementation of ASsist, and have had information migrated from the old StatIS application. To view the client history, including any StatIS history, first locate the client using any of the various search methods (case number, health card number plus issuer, or first name, last name, and date of birth). To do this, perform the following steps.

1. Locate the client in ASsist. In this example, the Case Number is used to locate the client.

The screenshot shows the ASsist web application interface. The top navigation bar includes 'Home', 'Lookup', 'Clients', 'Groups', 'Daily Service Records', 'Profile', 'Help', and 'Logout'. The 'Lookup' section is active, showing a search form. The 'Case No.' field is populated with '0900'. A callout box points to the 'Case No.' field with the text: 'Locate the client in ASsist. In this example, the Case No. is used to find the client.'

2. Click the **Lookup** button.

The screenshot shows the ASsist web application interface. The 'Case No.' field is populated with '0900005'. A mouse cursor is hovering over the 'Lookup' button. A callout box points to the 'Lookup' button with the text: 'Click the Lookup button'.

The current client information can be viewed on the screen. The current client information can be viewed by scrolling up and down this page.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Case No: Lookup by Client Id:

Client

Case No: 0900005 Old StatIS Case Numbers: 04987053

Last Name: Smith First Name: Ringo

Last Name at Birth:

Gender: Male * Age: 44

Contact Phone: 902 - 555 - 2584 ☐ Phone Call Allowed ☐ Message Allowed

Health Card Number: 0001734268 * Health Card Expiry Date: 2012/12/12 (yyyy/MM/dd)

Health Card Issuer: NS * Issuer Description:

Collection Staff: Tester, Treat(100353) * Collection Date: 2009/05/13 (yyyy/MM/dd) *

Client initially heard about service from: Acquaintance

Address

The current client information can be viewed by scrolling up and down this page.

- To view the history for this client, including StatIS information, click the **Print** button.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Case No: Lookup by Client Id:

Client

Case No: 0900005 Old StatIS Case Numbers: 04987053

Last Name: Smith * First Name: John *

Last Name at Birth: Alias/Goes By:

Gender: Male * Date of Birth: 1968/06/06 (yyyy/MM/dd) * Age: 44

Click the Print button

The Print page appears.

- Click the black checkbox next to the StatIS Treatment History component.

Select from the following components...

	Display Level	
	Summary	Detail
<input checked="" type="checkbox"/> Client	<input type="radio"/>	<input checked="" type="radio"/>
<input checked="" type="checkbox"/> List of Daily Service Record Activities	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> List of Group Sessions	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Intakes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Referral Recommendations	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Program Registrations	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Referral Recommendations	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> List of Daily Service Record Activities	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> List of Group Sessions	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> StatIS Treatment History	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> StatIS Substance History	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Select e Summary detail

Click the checkbox next to the StatIS Treatment History component

- Click the checkbox next to the StatIS Substance History component.

Select from the following components...		Display Level	
		Summary	Detail
<input checked="" type="checkbox"/>	Client		
<input checked="" type="checkbox"/>	List of Daily Service Record Activities	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	List of Group Sessions	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Intakes	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Referral Recommendations	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Program Registrations	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Referral Recommendations	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	List of Daily Service Record Activities	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	List of Group Sessions	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	StatIS Treatment History	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	StatIS Substance History	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Click the checkbox next to the StatIS Substance History component

Refresh Display Options

Select each of the following...		Summary
<input checked="" type="checkbox"/>	Intakes	detail


6. Scroll down to the bottom of the screen.
7. Click the **Print** button.

Select each of the following...		Summary
<input checked="" type="checkbox"/>	0900005 - John Smith - NS-0001734268	
<input checked="" type="checkbox"/>	Intakes	detail
<input checked="" type="checkbox"/>	Intake-50818, 2009/05/13 11:10 - Amherst CBS	summary
<input checked="" type="checkbox"/>	Intake-50817, 2009/05/13 11:10 - Amherst CBS	summary
<input checked="" type="checkbox"/>	Referral Recommendations	
<input type="checkbox"/>	Transfer-9723, On: 2009/05/07, From: Pictou PCU, To: CBS Gambling	
<input type="checkbox"/>	Transfer-9724, On: 2009/05/14, From: East Hants CBS, To: null	
<input checked="" type="checkbox"/>	Program Registrations	
<input checked="" type="checkbox"/>	Prg Reg-36786, 2009/05/14 - now, Amherst CBS, CBS General	summary
<input type="checkbox"/>	Referral Recommendations	
<input type="checkbox"/>	Transfer-9722, On: 2009/05/14, From: East Hants CBS, To: CBS Adolescent	
<input type="checkbox"/>	Transfer-9721, On: 2009/05/14, From: Amherst CBS, To: null	

Click the Print button

Print

8. The Print Preview page appears. The client information is displayed. Scroll down to view the StatIS history.



ASsist Client Profile and History
John Ringo Smith
Case No: 0900005
Printed On: 2011/02/15
Status: Client Inactive

Close

Print

Back

Personal Information

Old StatIS Case Numbers:	04987053		
Last Name at Birth:		Alias/Goes By:	
Date of Birth:	1966/06/06 44 years old	Gender:	Male
Contact Phone:	902-555-2584	Phone call is NOT allowed. <small>Message is NOT allowed.</small>	
Health Card Number:	0001734268	Health Card Description:	
Health Card Issuer:	NS		
Client initially heard about service from:	Acquaintance	OMS:	Not asked yet
Collection Staff:	Tester, Treat(100353)	Collection Date:	2009/05/13

The Client Information is displayed. Scroll down to view the StatIS History

Contact Information

Address

Mailing: PO Box 245

911/Cmc: 3 Red St.

Afton Station, Antigonish, Nova Scotia, A1A 1A1

Current Community:

StatIS history is shown here.

StatIS Treatment History - 9 items				
Region	Facility	Tx Date	Outcome	Referral
04	Springhill Detox	1998/02/12	Gambling Profile	
04	Springhill Detox & TOP	1998/03/12	NORMAL	Other DDSD Services, Self-Help (Addiction)
04	Springhill OPD	1998/03/17	Information Other	
04	Amherst OPD	1998/03/20	Information Spirituality	
04	Amherst OPD	1998/03/25	ASSESSMENT	Self-Help (Addiction), Self-Help (Addiction), Other DDSD Services
04	Amherst OPD	1998/03/25	Gambling Profile	
04	Amherst OPD	1998/04/08	ASSESSMENT	Self-Help (Addiction), Self-Help (Addiction)
04	Amherst OPD	1998/04/22	ASSESSMENT	
04	Amherst OPD	1998/05/13	ASSESSMENT	Self-Help (Addiction)

Client StatIS History is shown here.

StatIS Subs			
Code	Description	Created On	Moved to History On
05	Cannabis	1998/03/12	1998/03/23
01	Alcohol	1998/03/12	1998/03/23
02	Amphetamines/Rx Stimulant	1998/03/12	1998/03/23
11	Nicotine	1998/03/12	1998/03/23
06	Cocaine	1998/03/12	1998/03/23

To close the window, click the X in the upper right hand corner. Be sure to always close this window when finished, even if it was not actually printed, and just viewed.

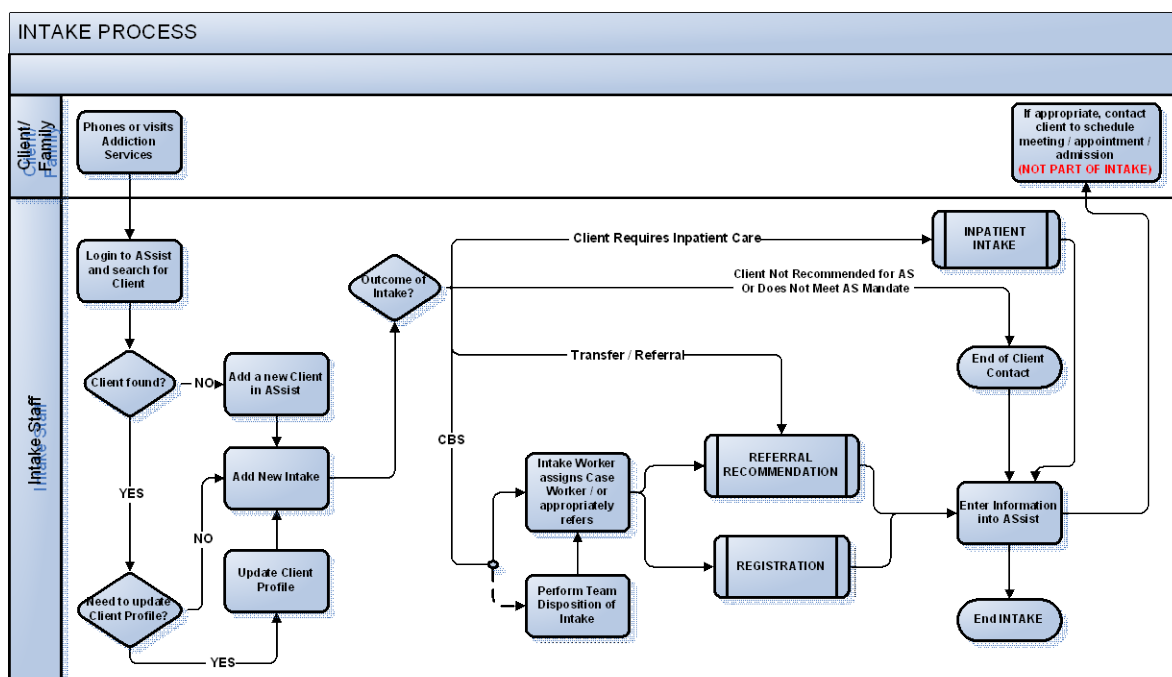
5.9 Intakes / Service Entry

5.9.1 Create an Intake

An Intake/Service Entry screen collects the preliminary information for a client and his or her request for treatment and services. An Intake for a client can only be created if a client already exists in ASsist. Also, the Intake screen can only be navigated from the Client Profile Screen.

The intake is to be completed during the initial contact with a client and whenever a client is registering for a new program, is returning to a program after discharge, or after three months of inactivity. An intake is also required for each admission to a Primary Care Unit (PCU). An Intake is also referred to as a “booking.”

The following diagram represents the business process flow for an Intake procedure with ASsist.



NOTE:

An intake has two specific distinctions: With a bed, and without a bed. Each can be further classified as either Requiring Withdrawal Management or Not Requiring Withdrawal management. The significant difference between whether or not a bed is required in ASsist is the necessity to fill out the booking information, which includes medical history. Specifically:

Bed Required: The Booking section is required and is visible on the screen
Bed Not Required: The Booking section is not required and is collapsed on the screen.

The following steps detail how to create an Intake for an existing client.

1. First, locate the client to which an Intake will be performed. In this example, the Case Number is used to locate the client.

The screenshot shows the ASsist web application interface. The top navigation bar includes 'Home', 'Lookup', 'Clients', 'Groups', 'Daily Service Records', 'Profile', 'Help', and 'Logout'. Below the navigation bar, there is a search section with a dropdown menu and a 'Lookup' button. The 'Lookup Client By' section contains several input fields: 'Case No.' (populated with '1100008'), 'Health Card Number', 'Last Name', 'First Name', and 'Date of Birth'. A callout box highlights the 'Case No.' field with the text: 'First, locate the client to which an Intake will be performed. In this example, the Case Number is used to locate the client.'

2. Click the **Lookup** button.

This screenshot is similar to the previous one, but the 'Case No.' field is now populated with '1100008'. The 'Health Card Issuer' dropdown is set to 'NS'. The 'Lookup' button is highlighted with a callout box that says 'Click the Lookup button'.

3. Scroll to the bottom of the Client Profile screen. The Intake/Service Entry section is displayed here. There are currently no Intakes for this client.

The screenshot shows the 'Intake/Service Entry' section of the client profile. The section title is 'Intake/Service Entry · no entries'. Below the title, there is a table with columns 'Id', 'Date', 'Site', and 'Duration'. A callout box points to the section with the text: 'The Intake/Service Entry section is displayed here. There are currently no intakes for this client.'

4. To create a new Intake/Service Entry, click on the **Create New** (Add) icon 

Characters remaining: 1484/1500

To add an Intake to this client, click the **Add New** icon

Intake/Service Entry • no entries

Edit

No items in list!

The Intake screen will appear.

- Click the arrow next to the **Site** field to display the list of available options.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Client Case No: 1100008 Name: MacDonald, Jimmy HCII: 12345678901 HCII Issuer: Other

To determine if a Full Intake is Required, select from the following ...

Site: < Please select > * Bed Required: ☐ Yes ☐ No ☐ Unknown * Withdrawal Management: ☐ Yes ☐ No ☐ Unknown *

Click the arrow next to the **Site** field to display the available options

- Choose the appropriate site from the drop-down list. In this example, **Antigonish CBS** is chosen.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Client Case No: 1100008 Name: MacDonald, Jimmy HCII: 12345678901 HCII Issuer: Other

To determine if a Full Intake is Required, select from the following ...

Site: < Please select > * Bed Required: ☐ Yes ☐ No ☐ Unknown * Withdrawal Management: ☐ Yes ☐ No ☐ Unknown *

Choose the correct site from the drop-down list. In this example, **Antigonish CBS** is chosen.

- Antigonish CBS
- Baddeck CBS
- Cheticamp CBS
- Glace Bay CBS
- Glace Bay PCU
- Grand Lake Road CBS
- Guysborough CBS
- Inverness CBS (DHA-7)
- Inverness CBS (DHA-8)
- New Waterford CBS
- New Waterford PCU
- North Sydney PCU
- North of Smokey CBS
- Northside CBS
- Port Hawkesbury CBS
- Port Hood CBS (DHA-7)
- St. Richmond CBS
- St. Richmond PCU
- Sydney CBS
- Sydney PCU

- Indicate whether or not a bed is required for this intake by choosing either Yes, No, or Unknown for the **Bed Required** field. In this example, **Yes** is chosen.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Client Case No: 1100008 Name: MacDonald, Jimmy HCH: 12345678901 HCH Issuer: Other

To determine if a Full Intake is Required, select from the following ...

Site: Antigonish CBS * Bed Required: ☒ Yes ☐ No ☐ Unknown * Withdrawal Management: ☐ Yes ☐ No ☐ Unknown *

Indicate whether a bed is required for this client by choosing either **Yes** or **No** or **Unknown** for the **Bed Required** field.

In this example, **Yes** is chosen.

8. Indicate whether or not Withdrawal Management is required by choosing either Yes, No, or Unknown in the **Withdrawal Management** field. In this example, **No** is chosen.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Client Case No: 1100008 Name: MacDonald, Jimmy HCH: 12345678901 HCH Issuer: Other

To determine if a Full Intake is Required, select from the following ...


Site: Antigonish CBS * Bed Required: ☒ Yes ☐ No ☐ Unknown * Withdrawal Management: ☐ Yes ☒ No ☐ Unknown *

Indicate whether Withdrawal Management is required for this client by choosing either **Yes** or **No** or **Unknown** for the **Withdrawal Management** field.

In this example, **No** is chosen.

The rest of the client intake fields will appear. Conduct the Intake interview with the client and proceed to enter information into the data fields.

NOTE:

At any time, click on the **Save** button to save the contents of the data fields. When finished with the Intake screen, the **Save** button should be clicked. Any errors will be displayed in a red message box at the top of the form and each erroneous field will display an error icon .

9. Fill in all the details regarding the intake for this client.

NOTE:

Details on specific fields can be found in the Data Definitions document, and in the Training Video specific to Intakes. The following are some business rules regarding specific fields, but be aware to populate as many fields as are known to fully complete the intake process:

- a. **Internal Transfer** is selected when the client completed an Intake with a program worker and was referred to another provincial addiction service; **Referring Agency** refers to the individual or agency that referred the client to currently enroll into program/services offered by our agency, and the **Referral Received On** is the date the client was referred to Addiction Services. Do not populate this field if the client is self-referred;
- b. The Referring Contact Name and Number fields should not be filled out if the Referring Agency field is "self";
- c. **Level of Priority** field:
 - i. A value of **Emergency** means homicidal, suicidal, or rapidly decompensating. If this is the case, the client must be seen immediately and appropriately referred;
 - ii. The **Urgent** option means the client is first time client and/or highly motivated, or is being transferred from another AS program and must be seen in 10 day business days or less. Also, urgent may mean the client is pregnant and must be seen in 3 business days or less;
 - iii. The **General** option means all other cases and must be seen in 15 business days or less;
- d. Note the Outcome section. This section is meant to capture the outcome of the intake at this specific point in time. For example, if the client is going to continue with treatment, indicate what program, what site, etc. Notice that the intake is considered complete when this section is complete. For some users, the intake will become read only at this point, however, the sections below will still be able to be updated; and
- e. Note the Intake Disposition section. This section is intended to capture information on the team disposition of an intake. This section is used in assigning an intake to an appropriate worker, who will then follow-up with the client and provide treatment. Note this section does not have to be filled in during the intake process; it can be filled in at a later time.

Intake	
Introduction	
Intake Id:	
Start Date and Time (24hr):	<input type="text"/> (yyyy/MM/dd HH:mm) *
Internal Referral (within Provincial AS):	< Please select >
Referring Agency:	
Referral Received On:	
Referring Contact Name:	
	Referral Mandatory <input type="checkbox"/>
	Telephone: <input type="text"/>
Requirements / History	
Confidentiality Policy Explained:	<input type="radio"/> Yes <input type="radio"/> No
Smoke Free Policy Explained:	<input type="radio"/> Yes <input type="radio"/> No
Reason for Client's Contact:	
Intake/Booking Process Explained:	<input type="radio"/> Yes <input type="radio"/> No
Scent Free Policy Explained:	<input type="radio"/> Yes <input type="radio"/> No
Client's Last Use or Gamble:	

10. The booking section is available because the Bed Required field at the beginning of this Intake was set to Yes. Otherwise, it would be collapsed.

The booking section is available because the **Bed Required** field at the beginning of this Intake was set to **Yes**. Otherwise, it would be collapsed.

Recommended Housing: < Please select >

Diagnosed Health Conditions: **Available**

- Allergies
- Asthma
- Blood Pressure Problems
- Bronchitis
- Cancer
- Communicable Diseases - Other
- Delirium Tremens
- Diabetes

Health Conditions General Comments: Characters remaining: 750/750

Current Prescriptions (medication name, dosage, frequency): Characters remaining: 750/750

Physical Required Before Admission: ☐ Yes ☐ No

Currently in Methadone/Opioid Substitution Maintenance Program: ☐ Yes ☐ No

Client Hospitalized in Last 12 Months: ☐ Yes ☐ No

Client Advised to Bring Medications in Original Containers: ☐ Yes ☐ No ☐ N/A

Mental Health Consultation Required Before Admission: ☐ Yes ☐ No

Methadone/Opioid Substitution Provider Details (if not AS): < Please select >

11. Fill in the information regarding the booking of an intake. Populate as many of the fields as possible. All fields populated in this example are filled in randomly.

Recommended Housing: < Please select >

Diagnosed Health Conditions: **Available**

- Allergies
- Asthma
- Blood Pressure Problems
- Bronchitis
- Cancer
- Communicable Diseases - Other
- Delirium Tremens
- Diabetes

Health Conditions General Comments: Characters remaining: 750/750

Current Prescriptions (medication name, dosage, frequency): Characters remaining: 750/750

Physical Required Before Admission: ☐ Yes ☐ No

Currently in Methadone/Opioid Substitution Maintenance Program: ☐ Yes ☐ No

Client Advised to Bring Medications in Original Containers: ☐ Yes ☐ No ☐ N/A

Mental Health Consultation Required Before Admission: ☐ Yes ☐ No

Methadone/Opioid Substitution Provider Details (if not AS): < Please select >

Methadone/Opioid: < Please select >

Fill in the information regarding the Booking of an intake. All the fields populated in this example are filled in randomly.

12. Note the **Attempts to Contact** section of the Intake. This is an important section. Fill it out correctly.

NOTE:

The Attempts to Contact section does not have to be filled in during the intake process; it can be filled in at a later time. It is intended to capture contact with a client that occurs in between the intake and the registration process. See data definitions for details document on the date fields, each of these date fields are very important. Also, ASsist provides some helpful information for this section by using the mouse-over

functionality.

Attempts to Contact		
Service First Available On:	<input type="text"/> (yyyy/MM/dd)	
Appt. Date and Time Accepted (24hr):	<input type="text"/> (yyyy/MM/dd HH:mm)	Method of Notification: < Please select >
Client Declined First Offered Service, which was available on:	<input type="text"/> (yyyy/MM/dd)	Reason Client Declined Service: < Please select >
Client Removed Name From Waitlist On:	<input type="text"/> (yyyy/MM/dd)	
Intake Closed Off on:	<input type="text"/> (yyyy/MM/dd)	Reason Intake Closed Off: < Please select >
Attempts to Contact Client:		
<div>Characters remaining: 4000/4000</div>		

13. Click the **Save** button.

Notes	
General Comments:	<div>Click the Save button</div>
<div>Characters remaining: 1000/1000</div>	
<div>Save</div>	

5.9.2 Edit an Intake/Service Entry

A current Intake may require editing.

NOTE:

For some users, Edits can only occur on Intakes in which the **Completed On Date** is not filled in. Also, edits may only occur on the Intake Disposition and Attempts to Contact Sections until the **Intake Closed Off On** date is set or a Program Registration is added.

Otherwise, the intake is “View Only.”

To make changes to an intake that is no longer edit-able, contact the ASsit staff with the privilege to make the change (e.g. Super Data Entry, Research and Statistical Officer, or Administrator).

The following steps describe how to edit an intake.


1. Perform a Client Lookup for a client who has an existing Intake.
2. Scroll down to the bottom of the Client Profile to the Intake/Service Entry summary section. The image below shows the Intake/Service Entry section from a Client Profile. There are two intakes for this client (Intake ID: 19107 and Intake ID: 19106, both circled).

The screenshot displays the 'Intake/Service Entry' section with two items. Each item is a card containing intake details and a table for program registrations. The first card is for Intake ID 19107, and the second is for Intake ID 19106. Both intake IDs are circled in red. To the right of each card is an 'Edit' icon, which is also circled in red.

Intake ID	Level of Priority	Start Date and Time	Intake Site
19107	General	2008/02/14 01:12	Barrington CBS
19106		2008/02/14 01:11	Annapolis CBS

Id	Program Name	Site	Start Date	Discharge Date	Reason for Discharge	Edit
No items in list!						

Id	Program Name	Site	Start Date	Discharge Date	Reason for Discharge	Edit
No items in list!						

3. To edit an Intake, click on the corresponding Edit/View icon  (circled in the following screen shot) in the edit column. Note that each Intake has its own Edit icon.

Intake/Service Entry - 2 items							Edit	
Intake Id: 19107	Level of Priority: General		Start Date and Time: 2008/02/14 01:12		Intake Site: Barrington CBS			
	Outcome: Continue with AS Program - No Bed		Recommended Program: CBS Nicotine		Intake Assigned To:			
Program Registrations - no entries								
	<input type="checkbox"/>	Id	Program Name	Site	Start Date	Discharge Date	Reason for Discharge	Edit
No items in list!								
Intake Id: 19106	Level of Priority:		Start Date and Time: 2008/02/14 01:11		Intake Site: Annapolis CBS			
	Outcome:		Recommended Program: CBS Women		Intake Assigned To:			
Program Registrations - no entries								
	<input type="checkbox"/>	Id	Program Name	Site	Start Date	Discharge Date	Reason for Discharge	Edit
No items in list!								

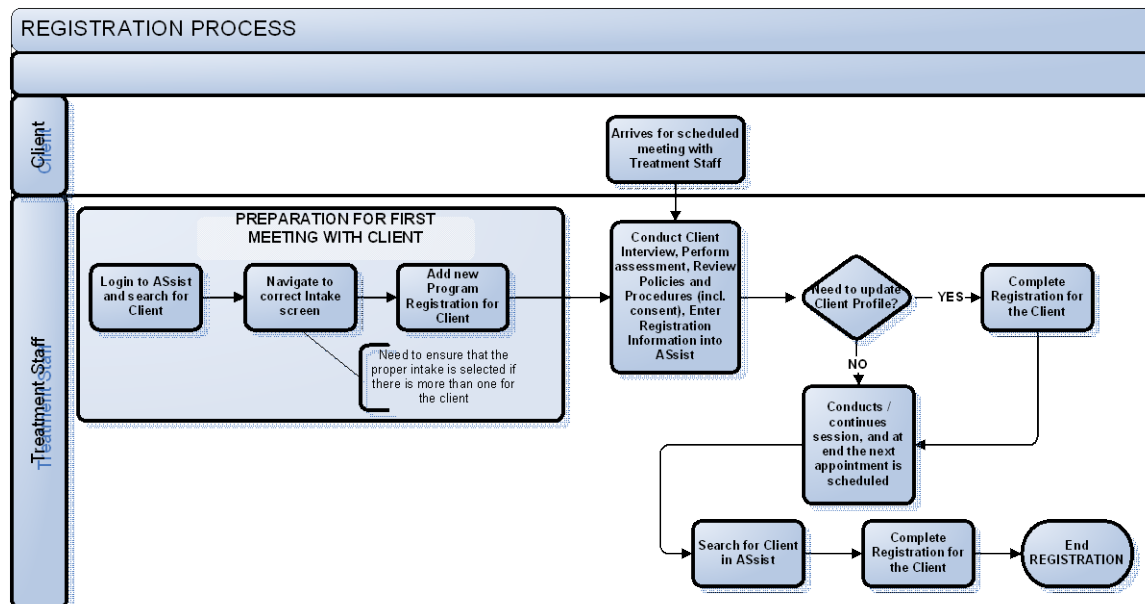
4. The Intake screen will display with the details of the client's Intake.
5. To edit one or many fields, simply go to the field and update/change the contents of the field.
6. When all edits have been completed, click on the **Save** button.

5.10 Program Registration

5.10.1 Create a Program Registration

A program registration is performed to register a client into a single Addiction Services program. The Program Registration screen contains information regarding client treatment issues along with other substance and gambling activity that the client has been involved with in the last 12 months.

The following diagram illustrates the business processes for a client's registration into a program.



A client registration can only be created from an Intake screen. The following steps outline how to create a program registration for a client.

1. First, locate the client who will be registered in a program. In this example, the Case Number is used to locate the client.

ASsist

Home Lookup Clients Groups Daily Service Records Profile Help Logout

To perform a quick lookup, select one of the following... *

Lookup Clear

Lookup Client By

Case No: 110008 *

Health Card Number: * Health Card Issuer: NS *

Last Name: * First Name: * Date of Birth: (yyyy/MM/dd) *

Lookup

First, locate the client who will be registered in a program. In this example, the case number is used to locate the client.

2. Click the **Lookup** button.

ASsist

Home Lookup Clients Groups Daily Service Records Profile Help Logout

To perform a quick lookup, select one of the following... *

Lookup Clear

Lookup Client By


Case No: 110008 *

Health Card Number: * Health Card Issuer: NS *

Last Name: * First Name: * Date of Birth: (yyyy/MM/dd) *

Lookup

Click the **Lookup** button

3. Scroll to the bottom of the Client Profile screen to the Intake/Service Entry section.
 - a. If this program registration is for a new Intake, click the Create New (Add) icon to create a new intake. For more information on how to create a new Intake, see section 5.9 of this ASsist Guide.
 - b. In this example, the program registration is for an existing intake. Click the Edit icon  to access the existing Intake.

Intake/Service Entry - 1 Item

Intake Id: 93819

Level of Urgent Priority: Continue with AS Program - Bed

Start Date and Time: 2011/03/07 14:49

Intake Site: St. Richmond PCU

Recommended Withdrawal Management Program: Inpatient


Intake Assigned To:

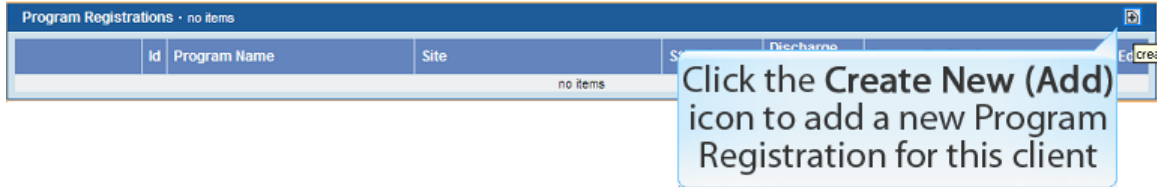
Program Registrations - no items

Id	Program Name	Site	Start Date	Discharge	Reason for Discharge	Edit
no items						

Click the Edit Icon to access an existing Intake

The Intake screen will be displayed. The Intake must contain all of the mandatory fields required to move forward completed prior to creating a Program registration.

4. Scroll down to the Program Registration section of the screen.
5. Click on the **Create New (Add)** icon  to add a new Program Registration for this client.



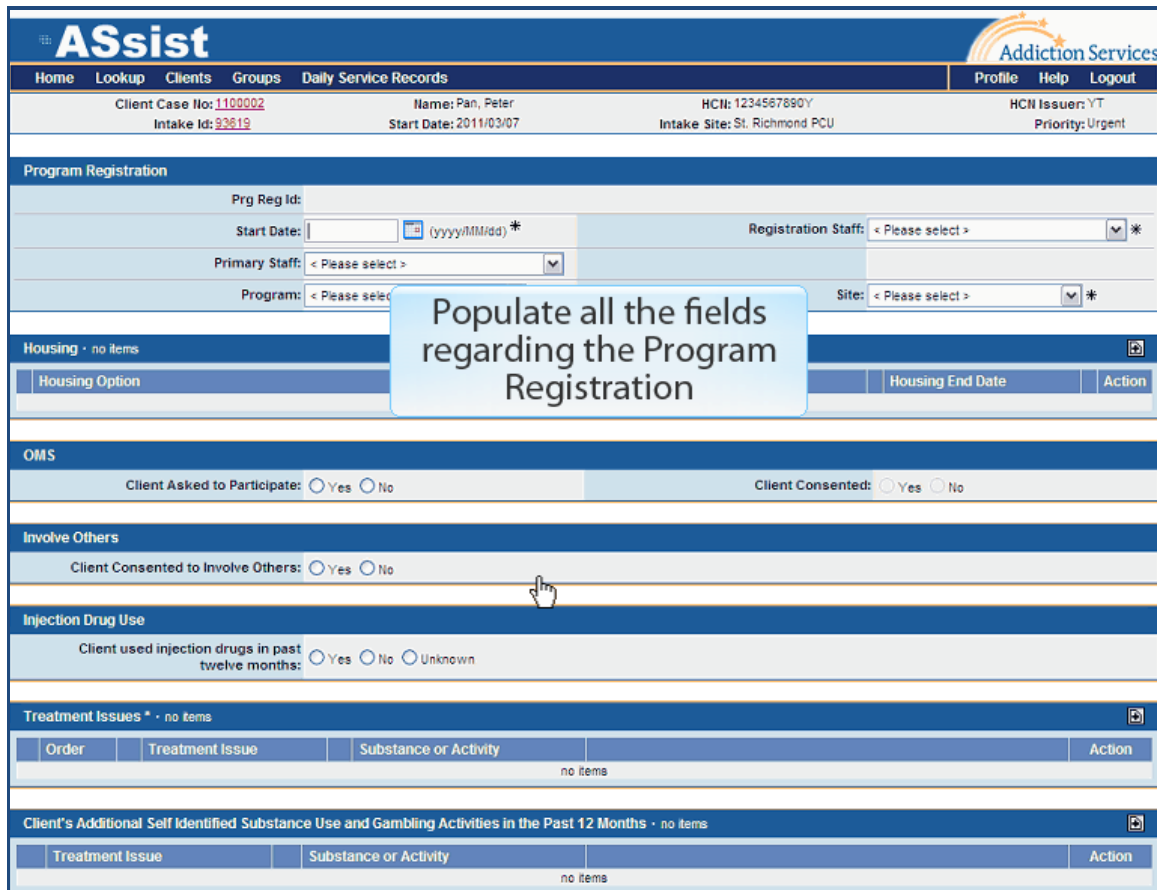
Program Registrations - no items

	Id	Program Name	Site	Status	Discharge
no items					

Click the **Create New (Add)** icon to add a new Program Registration for this client

The Program Registration screen will display with summary Client Profile and Intake information displayed in the top section (this cannot be edited on this screen).

6. Populate all the fields regarding the Program Registration.



ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Client Case No: 1100002 Name: Pan, Peter HCU: 1234567890Y HCU Issued: YT
 Intake Id: 93819 Start Date: 2011/03/07 Intake Site: St. Richmond PCU Priority: Urgent

Program Registration

Prg Reg Id: Start Date: (yyyy/MM/dd) * Registration Staff: *

Primary Staff: Program: Site: *

Housing - no items

Housing Option	Housing End Date	Action
no items		

OMS

Client Asked to Participate: ☐ Yes ☐ No Client Consented: ☐ Yes ☐ No

Involve Others

Client Consented to Involve Others: ☐ Yes ☐ No

Injection Drug Use

Client used injection drugs in past twelve months: ☐ Yes ☐ No ☐ Unknown

Treatment Issues * - no items

Order	Treatment Issue	Substance or Activity	Action
no items			











Client's Additional Self Identified Substance Use and Gambling Activities in the Past 12 Months - no items

Treatment Issue	Substance or Activity	Action
no items		





Populate all the fields regarding the Program Registration

NOTE:

Details on specific fields can be found in the Data Definitions document, and in the Training Video specific to Program Registrations. The following are some business rules regarding specific fields, but be aware to populate as many fields as are known to fully complete the Program Registration process:

- a. **Housing** - To add a Housing Option, the user must click on the **Create New** (Add) icon  in the housing section of the screen. A row will be enabled in the Housing section for the user to enter Housing details. Save the housing row by clicking the **Accept** icon 
 - i. To edit a Housing Option, click on the **Edit/View** icon  in the correct housing row. Edit details and click the **Accept** icon .
 - ii. To cancel a housing option, click on the **Cancel** icon .
- b. **OMS** – The OMS section consist of “write once” fields which appear as enabled fields until the fields are set. Once saved, the details of this section will appear as read only, and cannot be changed.
- c. **Treatment Issues** – Multiple treatment issues for a client can be entered in the Treatment Issues section. A treatment issue can be added by clicking on the Create New (Add) icon  in the Treatment Issues section. Fill in the client’s treatment issue details and save by clicking on the Accept icon 
 - i. To edit a treatment issue, click on the icon  in the correct Treatment Issue. Once the edits are complete, click the **Accept** icon .
 - ii. To cancel a treatment issue, click the **Cancel** icon .

After the Treatment Issues have been entered, there is an optional section called “Client’s Additional Self Identified Substance Use and Gambling Activities in the Past 12 Months”. The additional use has the same functionality to create (add), edit/read, accept, and cancel items as those defined for Treatment Issues.

The Gambling Profile questions are mandatory fields if gambling has been identified as a treatment issue. These fields are multi-select. Available options are selected by clicking on an item and then using the arrow icons (, , , ) to populate the Selected items box.

When all the information regarding the Program Registration process has been entered on the screen, click save (this can be done at any time provided all mandatory fields are populated). The **Save** button is found at the bottom of the Program Registration screen in the Discharge section.

7. Click the **Save** button.

General Comments:

Characters remaining: 1000/1000

Save

Click the Save button

NOTE:


At the bottom of the Program Registration screen, there are summary sections for Client Activities, Groups, and Referral Recommendations. These sections will display Daily Service Record activities, Group Sessions and Referrals Recommendations associated with the Client and the current Program Registration. The items are read-only and therefore cannot be edited from the Program Registration screen

5.10.2 Edit a Program Registration


At any time, a Program Registration may require changes. The following steps outline how a Program Registration can be edited.

NOTE:

Edits can only occur on Program Registrations that are not discharged. If it is necessary to edit a Program Registration after a client has been discharged or the case file has been closed, contact the ASsist Champion for information on editing these Program Registrations.

1. Navigate to the **Program Registration** screen section of the Client Profile or Intake screen.
2. Click the Program Registration **Edit** icon  to edit the existing Program Registration.


Intake/Service Entry · 1 Item

Intake 93619
Id: 

Level of Urgent Priority: Start Date and 2011/03/07 14:49 Time: Intake Site: St. Richmond PCU

Outcome: Continue with AS Program - Bed Recommended Withdrawal Management Inpatient Intake Assigned To:

Program Registrations · 1 Item

Id	Program Name	Site	Start Date	Discharge Date	Reason for Discharge	Edit
67649	Withdrawal Management Inpatient	St. Richmond PCU	2011/03/07			

Client Activities not Associated to Program · no items

Id	Date	Activity	Status
There are no Client Activities associated			

Click the Edit icon to edit the existing Program Registration

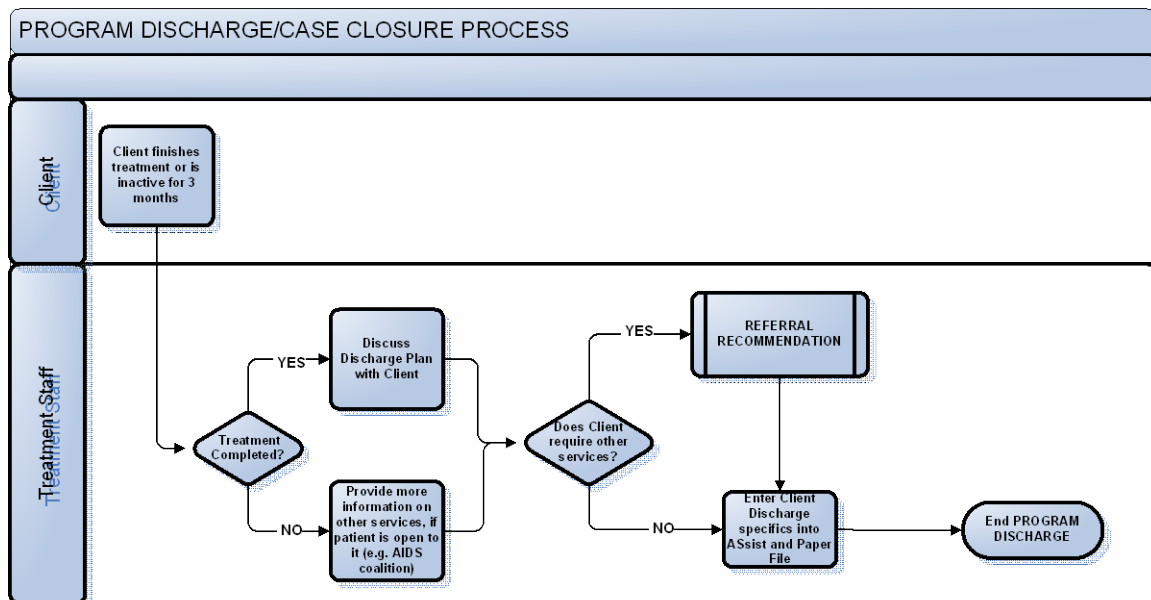
The Program Registration screen displays the details of the client's Registration.

3. To edit, simply update/change the contents of the field(s).
4. When all edits have been completed, click the **Save** button.

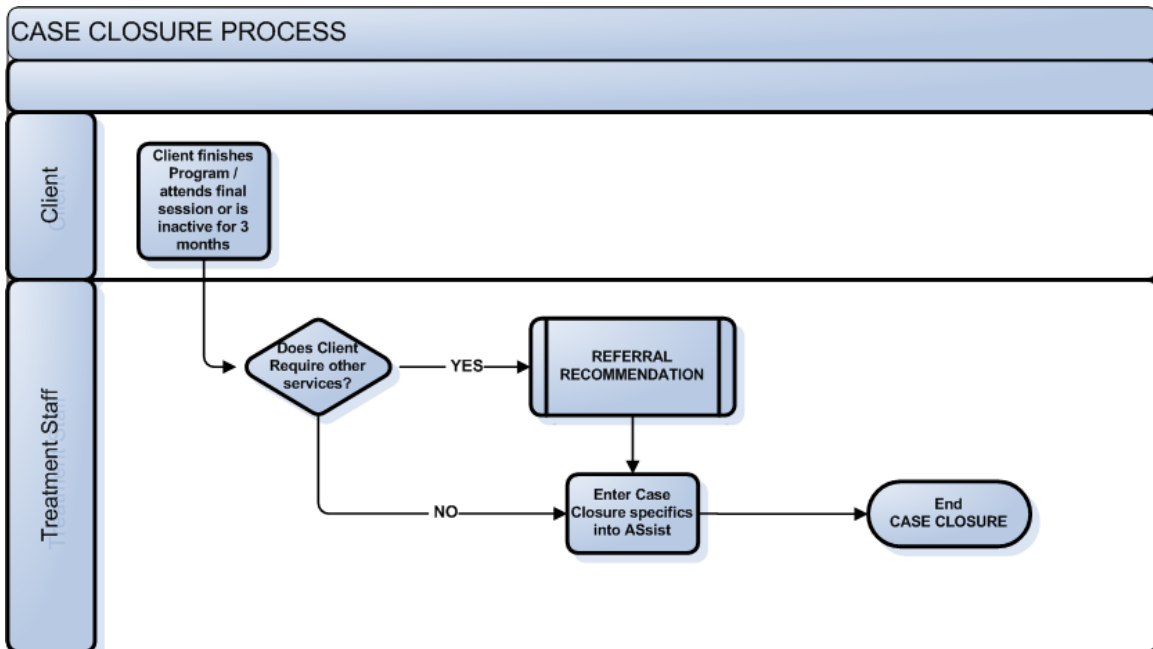
5.10.3 Discharge Client from a Program or Close Case File

When a client is no longer participating in a program, he or she must be discharged from that program, or have the case file closed. Addiction Services collects discharge information for clients in order to better understand client outcomes. A Discharge or Case Closure can only be performed in the Program Registration screen.

The following diagram describes the discharge business process.



The following diagram describes the case closure business process flow.



To discharge clients or close a case file, follow the steps below.

Perform a client lookup using any of the available methods to locate the client to be discharged or have the case closed in ASsist. In this example, the Case Number is used.

1. First, locate the client in ASsist who will be discharged.


In this example, the Case No is used to find the client.

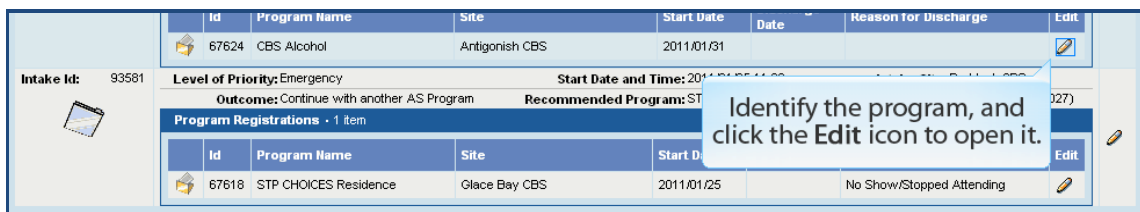
2. Click the **Lookup** button.



The screenshot shows the ASsist Home Page. At the top, there is a navigation bar with links: Home, Lookup, Clients, Groups, Daily Service Records, Profile, Help, and Logout. Below this, there are two search boxes: 'Lookup by Case No:' and 'Lookup by Client Id:'. A 'Lookup' button is highlighted with a blue callout box that says 'Click the Lookup button'. Below the search boxes, there are input fields for 'Last Name: NOPQRS', 'First Name: MINOPGR', and 'Middle Name: QRSTUVW'. There are also fields for 'Case No:', 'Old Stat's Case Numbers:', and 'Intake Id:'.

The client profile page appears.

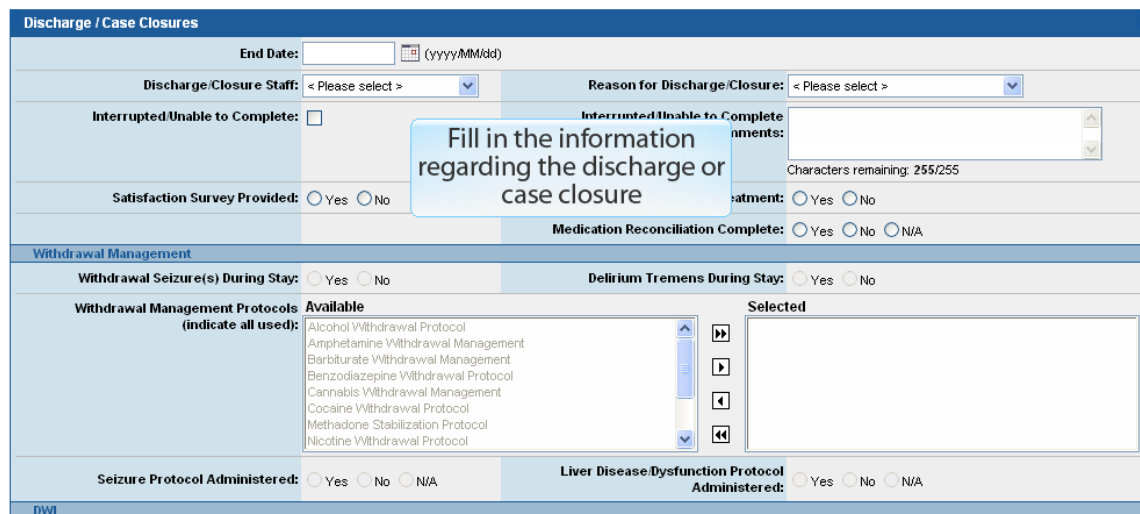
3. Scroll down to the section that refers to client Intakes and Program Registrations.
4. Identify the program, and click on the **Edit/View** icon  to open it.



The screenshot shows the client profile page. It displays a table of 'Program Registrations' with columns: Id, Program Name, Site, Start Date, Date, Reason for Discharge, and Edit. The first row shows '67624 CBS Alcohol' at 'Antigonish CBS' with a start date of '2011/01/31'. The second row shows '67618 STP CHOICES Residence' at 'Glouce Bay CBS' with a start date of '2011/01/25'. A blue callout box points to the 'Edit' icon (pencil) for the second row, with the text 'Identify the program, and click the Edit icon to open it.'.

The ASsist Treatment – Program Registration page opens.

5. Scroll down to the Discharge Client/Case Closures section of the screen.
6. Fill in all the known information regarding the discharge or case closure.



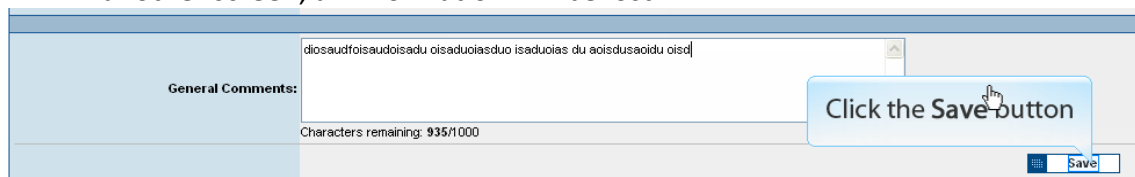
The screenshot shows the 'Discharge / Case Closures' form. It contains various fields for recording client information, including 'End Date', 'Discharge/Closure Staff', 'Reason for Discharge/Closure', 'Interrupted Unable to Complete', 'Satisfaction Survey Provided', 'Medication Reconciliation Complete', 'Withdrawal Management', 'Seizure Protocol Administered', and 'Liver Disease Dysfunction Protocol Administered'. A blue callout box points to the 'Interrupted Unable to Complete' field, with the text 'Fill in the information regarding the discharge or case closure'.

NOTE:
For complete information on all the fields specific to discharging a client or closing the case file, refer to the Data Definitions Document. Here are some examples of how some fields should be populated, but be aware that all fields should be populated whenever

possible.

- a. Note the **Client Requires Further Treatment** field. This field is to be populated with the professional opinion of the staff member, and does not mean the client agreed to further treatment. If set to yes (and discharge status is normal), attach a referral recommendation;
- b. Note the **Interrupted/Unable to Complete** field should only be used on an exceptional case basis. For example, if a client leaves treatment, and the staff member determines that it will not be possible to collect the rest of the discharge information (including the mandatory fields), this field can be checked, making the mandatory fields no longer mandatory;
- c. Note the **Medication Reconciliation Complete** field:
 - i. Select N/A when this is not a required process of the program;
 - ii. Select No when the process was required but it was not completed; and
 - iii. Select Yes if the process was required and was completed; and,
- d. Special Program Indicators: If the program discharge or case closure is for Withdrawal Management, Methadone/Opiod Treatment or for Driving While Impaired or Alcohol Ignition Interlock programs, these additional fields are mandatory.

7. When all known information has been entered into the discharge section of the screen, click the **Save** button. If **Save** is not clicked, or if the user navigates to another screen, all information will be lost.



8. To be sure the client has been discharged from the Program; go back to the client profile screen. Note the client has been successfully discharged from the program.



Intake Id:	Level of Priority:	Start Date and Time:	Intake Site:			
93587	Urgent	2011/01/31 10:48	St. Richmond PCU			
Outcome: Continue with AS Program - Bed Recommended Program: Withdrawal Management Inpatient Intake Assigned To:						
Program Registrations - 1 item						
ID	Program Name	Site	Start Date	Discharge Date	Reason for Discharge	Edit
67624	CBS Alcohol	Antigonish CBS	2011/01/31	2011/01/31	Left Against Advice	
93581	Emergency	2011/01/25 11:20				
Outcome: Continue with another AS Program Recommended Program: STP Men & Anger						
Program Registrations - 1 item						
ID	Program Name	Site	Start Date	Discharge Date	Reason for Discharge	Edit
67618	STP CHOICES Residence	Glace Bay CBS	2011/01/25		No Show/Stopped Attending	

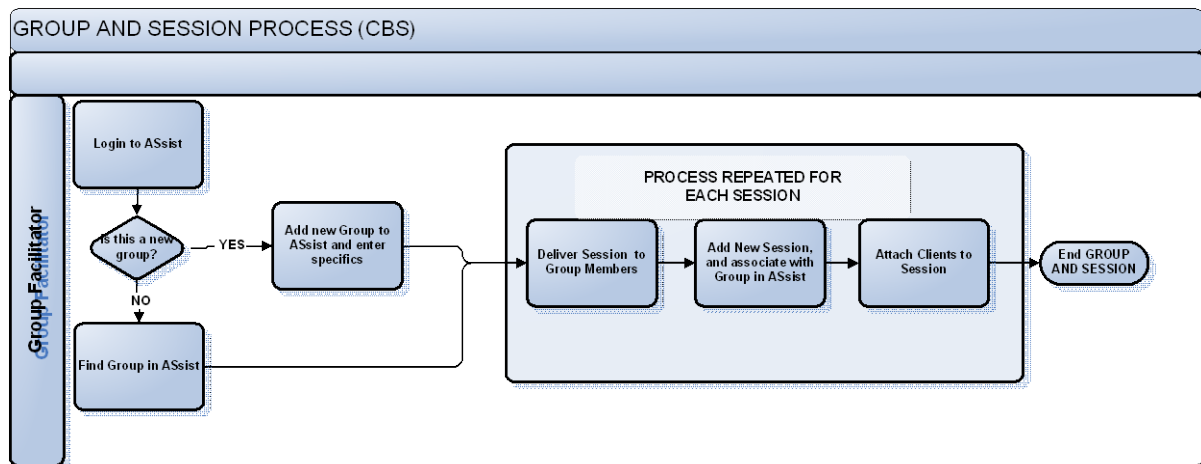
NOTE:

At this point, the Program Registration will become “read only” and any further editing of the program registration for this client cannot be done by most ASsist users. If editing is necessary, escalation is required, and the user should contact the RSO/QMC/PPA or other person who has privileges to edit “read only” screens.

5.11 Groups and Sessions

In ASsist, the purpose of a group is to define the reason and details for which a group of Addiction Services’ clients convene. The meeting of group members is called sessions and a group can have one or many sessions. With ASsist, a group needs to be registered prior to the details of one or many sessions being inputted and associated with the group.

The following diagram represents the business process for Groups and Sessions (Community Based Sessions).



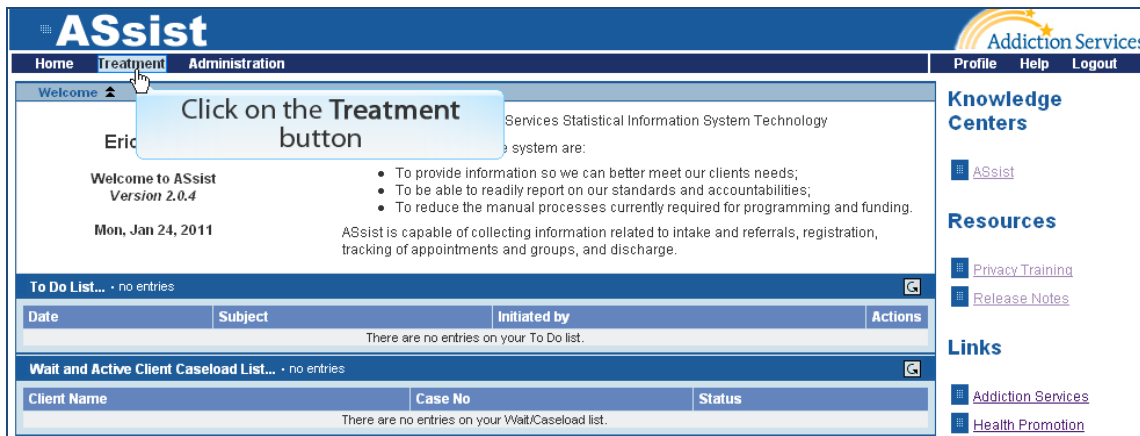
5.11.1 Search for an existing Group

A group can be searched for using various methods. In this section, a group will be searched for using:

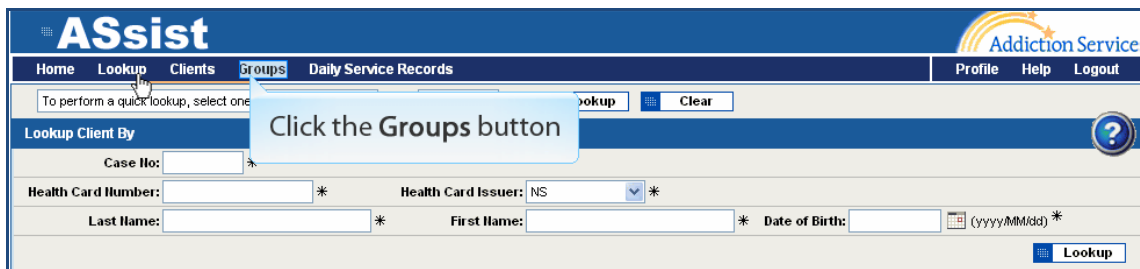
- The Group ID;
- Group Definers; or,
- The Session ID.

Example 1: Search using the Group ID.

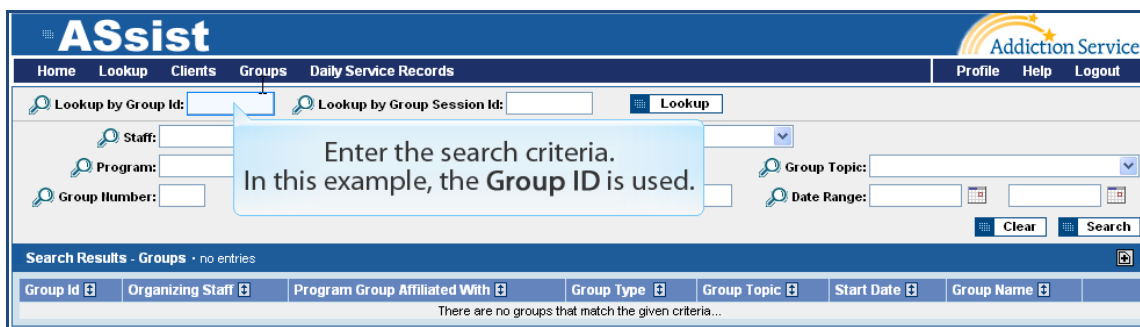
1. From the Home page, click on the **Treatment** button.



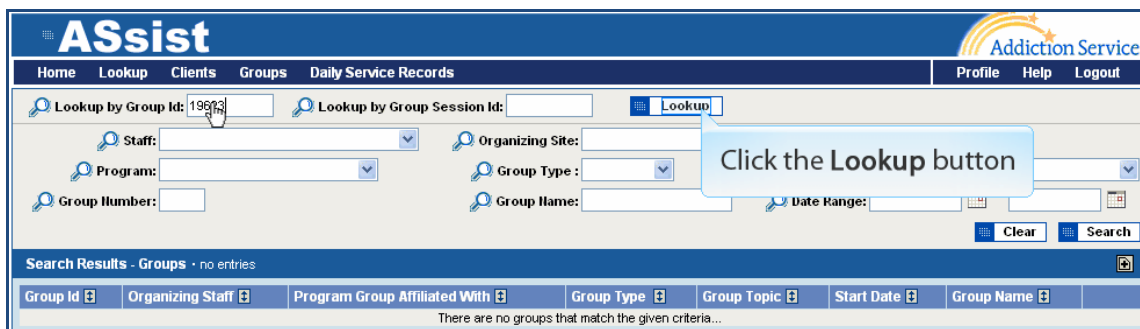
2. Click the **Groups** button.



3. Enter the search criteria. In this first example, the Group ID is used.



4. Click on the **Lookup** button.



The ASsist Treatment – Group page appears.

Group

Group Id: 19623

Start Date: 2011/01/24 *

End Date: 2011/01/29 *

Organizing Staff: Royal, Erica(100501) *

Organizing Site: Bayers Road CBS *

Program Group Affiliated With: CCSS Women's Treat Serv *

Group Type: Information *

Group Topic: Recreation Therapy Functional Intervention *

Group Number:

Group Name:

Group Definers

Audience Categories:

Available: Child Protection Referrals, Clients A, Communi, Concern, Concurr, Criminal Justice System Referrals, DVM Referrals, EAP Referrals

Selected: Adult Children of Alcoholics

The ASsist Treatment - Groups page appears

Example 2: Search using Group Information.

A group can also be searched using various other searching criteria. Different types of search parameters can be used to filter the list including Staff (Organizing or Facilitator), Organizing Site, Program, Group Type, Group Topic, Group Number, Group Session ID, Group Name and Date Range.

In this second example, the **Program** and **Organizing Site** fields are used to return a list of groups.

1. From the **Groups** screen, enter in known search criteria so it can be found in ASsist.

ASsist

Home Lookup Clients **Groups** Daily Service Records Profile Help Logout

Lookup by Group Id: Lookup by Group Session Id: Lookup

Staff: Organizing Site:

Program: Group Type: Group Topic: Date Range: Clear Search

Search Results - Groups - no entries

Group Id Organizing Staff Program Group Topic Start Date Group Name

There are no groups that match the given criteria...

Enter in known criteria about the Group so it can be found in ASsist

2. In this example, the **Program** field will be used to locate groups. Click the arrow next to the Program field to display a list of available options.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Group Id:
 Lookup by Group Session Id:

Staff:
 Organizing Site:

Program:
 Group Type:
 Group Topic:

Group Number:
 Date Range:

Search Results - Groups - no entries

Group Id	Organizing Staff	Program Group Affiliated With	Group Type	Group Topic	Start Date	Group Name
There are no groups that match the given criteria...						

Click on the arrow next to the Program field to display the available options

- Choose the appropriate Program from the drop down list. In this example, **CBS Alcohol** is chosen.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Group Id:
 Lookup by Group Session Id:

Staff:
 Organizing Site:

Program:
 Group Type:
 Group Topic:

Group Number:
 Date Range:

Search Results - Gr

Group Id	Org
AEP	
AJP	
CBS Adolescent	
CBS Alcohol	
CBS CHOICES	
CBS Gambling	
CBS General	
CBS Nicotine	
CBS Women	
CCSS Women's Treat Serv	
DVI	
MMT	
RMV Driver Competency	

Choose the program from the drop-down list. In this example, CBS Alcohol is chosen.

- Click the arrow next to the **Organizing Site** field to display the list of available options.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Group Id:
 Lookup by Group Session Id:

Staff:
 Organizing Site:

Program:
 Group Type:
 Group Topic:

Group Number:
 Group Name:

Search Results - Groups - no entries

Group Id	Organizing Staff	Program Group Affiliated With	Group Type	Group Topic	Start Date	Group Name
There are no groups that match the given criteria...						

Click on the arrow next to the Organizing Site field to display the available options

- Choose the appropriate Organizing Site from the drop down list available. In this example, **Antigonish CBS** is chosen.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Group Id:
 Lookup by Group Session Id:

Staff:
 Organizing Site:
 Group Topic:

Program: CBS Alcohol
 Group Type:
 Date Range: -

Group Number:
 Group Name:

Search Results - Groups - no entries

Group Id	Organizing Staff	Program Group Affiliated With	Group Type	Group Topic
There are no groups that match the given criteria...				

Choose the Organizing Site from the drop-down list. In this example, Antigonish CBS is chosen.

- Click the **Search** button to display all the groups that match the search criteria entered.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Group Id:
 Lookup by Group Session Id:

Staff:
 Organizing Site: Antigonish CBS
 Group Topic:

Program: CBS Alcohol
 Group Type:
 Date Range: -

Group Number:
 Group Name:

Search Results - Groups - no entries

Group Id	Organizing Staff	Program Group Affiliated With	Group Type	Group Topic
There are no groups that match the given criteria...				

Click the Search button

All groups matching the search criteria would be displayed. In this example, the search returned no groups. ASsist indicates that no groups were found.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Group Id:
 Lookup by Group Session Id:

Staff:
 Organizing Site:
 Group Topic:

Program:
 Group Type:
 Date Range: -

Group Number:
 Group Name:

Search Results - Groups - no entries

Group Id	Organizing Staff	Program Group Affiliated With	Group Type	Group Topic	Start Date	Group Name
There are no groups that match the given criteria...						

If no groups are found matching the search criteria, the message indicating so will appear here

- To search again, first, clear the current search criteria by clicking the **Clear** button.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Group Id: Lookup by Group Session Id:

Staff: Organizing Site: Group Topic:

Program: Group Type: Date Range:

Group Number: Group Name:

Search Results - Groups - 1 item

Group Id	Organizing Staff	Program Group Affiliated With	Group Type	Group Name
19620	Acker, Cindy(100378)	CBS Alcohol	Information	CBS Alcohol

Click the **Clear** button to clear the current search criteria

8. Re-enter new search criteria.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Group Id: Lookup by Group Session Id:

Staff: Organizing Site: Group Topic:

Program: Group Type: Date Range:

Group Number: Group Name:

Search Results - Groups - no entries

Group Id	Organizing Staff	Program Group Affiliated With	Group Type	Group Name
There are no groups that match the given criteria...				

Re-enter some different search criteria to find the existing group

In this example, the **Group Type** field is used to search for existing groups.

1. Click on the arrow next to the **Group Type** field to display the list of available options.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Group Id: Lookup by Group Session Id:

Staff: Organizing Site: Group Topic:

Program: Group Type: Date Range:

Group Number: Group Name:

Search Results - Groups - no entries

Group Id	Organizing Staff	Program Group Affiliated With	Group Type	Group Name
There are no groups that match the given criteria...				

Click the arrow next to the **Group Type** field to display the available options

2. Choose the group type from the drop-down list. In this example, **Training** is chosen.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Group Id: Lookup by Group Session Id:

Staff: Organizing Site:

Program: Group Type: Group Topic:

Group Number: Group Name: Date Range:

Search Results - Groups - no entries

Group Id Organizing Staff Program Group Affiliated With Group Type Group Name

There are no groups that match the given criteria...

Choose a Group Type from the drop down list. In this example, Training is chosen.

3. Click the **Search** button.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Group Id: Lookup by Group Session Id:

Staff: Organizing Site:

Program: Group Type: Group Topic:

Group Number: Group Name: Date Range:

Search Results - Groups - no entries

Group Id Organizing Staff Program Group Affiliated With Group Type Group Name

There are no groups that match the given criteria...

Click the Search button

All the groups in ASsist that match the search criteria are displayed.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Group Id: Lookup by Group Session Id:

Staff: Organizing Site:

Program: Group Type: Group Topic:

Group Number: Group Name: Date Range:

Search Results - Groups - 1 to 10 of 17

Group Id	Organizing Staff	Program Group Affiliated With	Group Type	Group Topic	Start Date	Group Name	
239	(Cormier, Mary(11018))	CBS General	Training	Quitting Smoking	2006/02/02		
2355	Garby, Kris(6022)	CBS Adolescent	Training	Adolescent Services	2007/05/04	ITA Teacher Training	
2143	Peters, Dawn(9829)	CBS General	Training	Life Skills			
2448	Dwyn, Gwyneth(100185)	CBS General	Training	Addiction Services Orientation			
3734	Peters, Dawn(9829)	CBS Women	Training	Other		ental	
3940	Doyle, Karen(11017)	CBS Adolescent	Training	Addiction			
7802	(Godin, Joey(100247))	CBS CORE	Training	Acupuncture	2008/05/21	Acupuncture & Relaxation	
10204	(Walsh, Dorothy(30083))	STP CDHA	Training	Healthy Living	2008/11/24	Forgiveness	
10227	Cantley, Jennifer(30091)	STP CDHA	Training	Healthy Living	2008/11/25	Leisure & Wellness	
10003	Cantley, Jennifer(30091)	STP CDHA	Training	Healthy Living	2008/11/11	Yoga	

All groups matching the search criteria are displayed here

A group can be opened or edited by clicking on the **Edit/View** icon

Search Results - Groups • 1 to 10 of 17

Group Id	Organizing Staff	Program Group Affiliated With	Group Type	Group Topic	Start Date	Group Name	
239	(Cormier, Mary(11018))	CBS General	Training	Quitting Smoking	2006/02/02		
2355	Garby, Kris(6022)	CBS Adolescent	Training	Adolescent Services	2007/05/04	ITA Teacher Training	
2143	Peters, Dawn(9829)	CBS General	Training	Life Skills	2007/04/30	Anxiety - skills group	
2448	Dwyn, Gwenyth (100185)	CBS General	Training	Addiction Services Orientation	2007/05/22	Introduction to Addiction	
3734	Peters, Dawn(9829)	CBS Women	Training	Other	2007/05/22		
3940	Doyle, Karen(11017)	CBS Adolescent	Training	Addiction	2007/05/22		
7802	(Godin, Joey(100247))	CBS CORE	Training	Acupuncture	2008/01/11		
10204	(Walsh, Dorothy(30083))	STP CDHA	Training	Healthy Living	2008/11/24	Forgiveness	
10227	Cantley, Jennifer(30091)	STP CDHA	Training	Healthy Living	2008/11/25	Leisure & Wellness	
10003	Cantley, Jennifer(30091)	STP CDHA	Training	Healthy Living	2008/11/11	Yoga	

To open a group, click on the Edit icon

Example 3: Search using Session ID.

A group session can also be found by entering a known Group Session Id in the lookup function. In this third example, the Group Session ID is entered.

1. Type in the Group Session ID into the **Lookup by Group Session Id** field.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Group Id: **Lookup by Group Session Id:**

Staff: Organizing Site:

Program: Group Type: Group Topic:

Group Number: Group Name: Date Range:

Search Results - Groups • no entries

Group Id	Organizing Staff	Program Group Affiliated With	Group Type	Group Topic	Start Date	Group Name
----------	------------------	-------------------------------	------------	-------------	------------	------------

There are no groups that match the given criteria...

2. Click the **Lookup** button.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by Group Id: **Lookup by Group Session Id:**

Staff: Organizing Site:

Program: Group Type: Group Topic:

Group Number: Group Name: Date Range:

Search Results - Groups • no entries

Group Id	Organizing Staff	Program Group Affiliated With	Group Type	Group Topic	Start Date	Group Name
----------	------------------	-------------------------------	------------	-------------	------------	------------

There are no groups that match the given criteria...

Click the Lookup button

The group will be displayed on the screen. If there are multiple pages of groups found matching the search criteria, they can be viewed by using the arrow button, as circled in the following screenshot.

Search Results - Groups • 1 to 10 of 17							
Group Id	Organizing Staff	Program Group Affiliated With	Group Type	Group Topic	Start Date	Group Name	
239	(Cormier, Mary(11018))	CBS General	Training	Quitting Smoking	2006/02/02		
2355	Garby, Kris(6022)	CBS Adolescent	Training	Adolescent Services	2007/05/04	ITA Teacher Training	
2143	Peters, Dawn(9829)	CBS General	Training	Life Skills	2007/04/30	Anxiety - skills group	
2448	Dwyn, Gwennyth (100185)	CBS General	Training	Addiction Services Orientation	2007/05/22	Introduction to Addiction	
3734	Peters, Dawn(9829)	CBS Women	Training	Other	2007/08/08	Anxiety Skills Group with Mental Health	
3940	Doyle, Karen(11017)	CBS Adolescent	Training	Addiction	2007/09/21		

5.11.2 Edit a Group

When multiple groups are displayed, each column may be sorted as depicted by the double arrow icon in the column header. Clicking on this button will sort the corresponding column either descending or ascending.

1. To open a group click on the **Edit/View** icon and the **Edit Group** Screen will appear.

Search Results - Groups • 1 to 10 of 17							
Group Id	Organizing Staff	Program Group Affiliated With	Group Type	Group Topic	Start Date	Group Name	
239	(Cormier, Mary(11018))	CBS General	Training	Quitting Smoking	2006/02/02		
2355	Garby, Kris(6022)	CBS Adolescent	Training	Adolescent Services	2007/05/04	ITA Teacher Training	
2143	Peters, Dawn(9829)	CBS General	Training	Life Skills	2007/04/30	Anxiety - skills group	
2448	Dwyn, Gwennyth (100185)	CBS General	Training	Addiction Services Orientation	2007/05/22	Introduction to Addiction	
3734	Peters, Dawn(9829)	CBS Women	Training	Other	2007/08/08		
3940	Doyle, Karen(11017)	CBS Adolescent	Training	Addiction	2007/09/21		
7802	(Godin, Joey(100247))	CBS CORE	Training	Acupuncture	2008/01/11		
10204	(Walsh, Dorothy(30083))	STP CDHA	Training	Healthy Living	2008/11/24	Forgiveness	
10227	Cantley, Jennifer(30091)	STP CDHA	Training	Healthy Living	2008/11/25	Leisure & Wellness	
10003	Cantley, Jennifer(30091)	STP CDHA	Training	Healthy Living	2008/11/11	Yoga	

2. Make changes to the group information as necessary.
3. Click the **Save** button.

5.11.3 Create a New Group

The following steps outline how Groups are registered in the ASsist application.

1. Navigate to the Groups Search screen. From the Home screen, click on the **Treatment** button, and then click on the **Groups** menu item.
2. The search results will be displayed.
3. Click the **Create New (Add)** icon to add a new group.

The screenshot shows the ASsist Home page with the 'Groups' tab selected. A callout box points to the 'Add New' icon in the top right corner, stating: 'Click the Add New icon to add a new group'. Below the search filters, a table displays search results for groups.

Group Id	Organizing Staff	Program Group Affiliated With	Group Type	Group Topic	Start Date	Group Name	Actions
19629	Reeves, Heather(100502)	CBS Adolescent	Education	High Risk/Problem Drinking	2011/01/20		edit

4. Populate the fields with the information about the group.

The screenshot shows the 'Group' form in the ASsist system. A callout box points to the form fields, stating: 'Populate the fields with the information about the Group'. The form includes fields for Group Id, Start Date, End Date, Organizing Staff, Organizing Site, Program Group Affiliated With, Group Type, Group Topic, Group Number, and Group Name. Below these are sections for Audience Categories and Age Groups, each with 'Available' and 'Selected' lists.

Fields denoted with an asterisk (*) are mandatory.

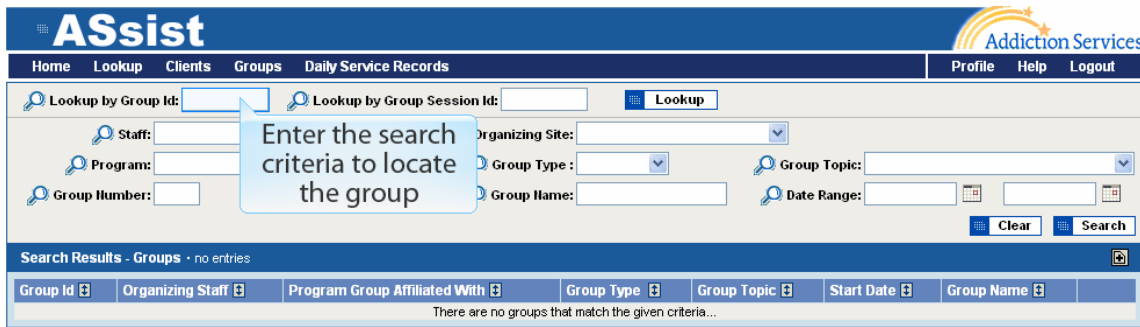
5. Click the **Save** button.

The screenshot shows the 'Ethnicities' form in the ASsist system. A callout box points to the 'Save' button, stating: 'Click the Save button'. The form includes an 'Available' list of ethnicities and a 'Selected' list. The 'Save' button is located at the bottom right of the form.

5.11.4 Create a Session for a Group

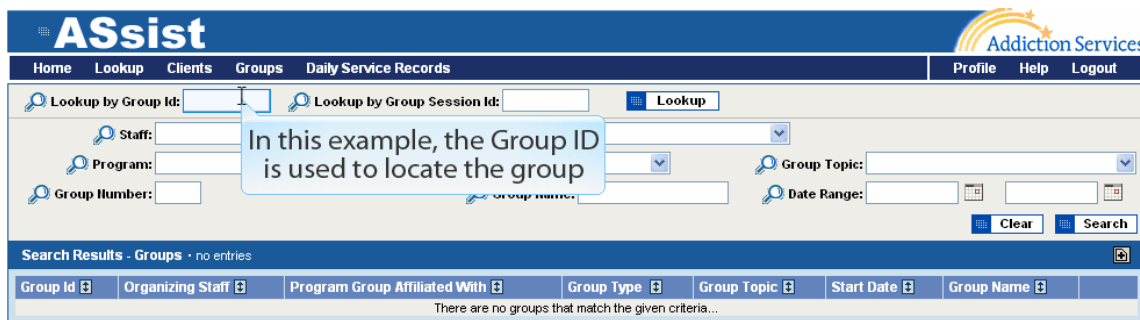
A Session can be defined as a meeting of a Group. There can be one or many sessions associated with a Group. The following steps outline how a Session can be added to a Group.

1. From the Home page, click on the **Treatment** button, and then click on the **Group** button.
2. Enter the search criteria to locate the group.



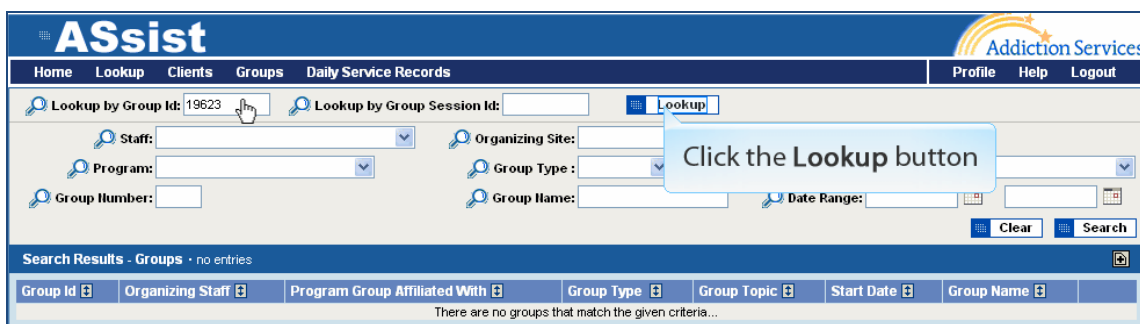
The screenshot shows the ASsist web application interface. The top navigation bar includes 'Home', 'Lookup', 'Clients', 'Groups', and 'Daily Service Records'. The 'Lookup' section is active, showing search criteria for 'Lookup by Group Id', 'Lookup by Group Session Id', 'Staff', 'Program', 'Group Number', 'Organizing Site', 'Group Type', 'Group Name', 'Group Topic', and 'Date Range'. A callout box with the text 'Enter the search criteria to locate the group' points to the search fields. The 'Search' button is visible at the bottom right of the form.

3. In this example, the Group ID is used to locate the group.




The screenshot shows the ASsist web application interface. The top navigation bar includes 'Home', 'Lookup', 'Clients', 'Groups', and 'Daily Service Records'. The 'Lookup' section is active, showing search criteria for 'Lookup by Group Id', 'Lookup by Group Session Id', 'Staff', 'Program', 'Group Number', 'Organizing Site', 'Group Type', 'Group Name', 'Group Topic', and 'Date Range'. A callout box with the text 'In this example, the Group ID is used to locate the group' points to the 'Lookup by Group Id' field. The 'Search' button is visible at the bottom right of the form.

4. Click on the **Lookup** button.



The screenshot shows the ASsist web application interface. The top navigation bar includes 'Home', 'Lookup', 'Clients', 'Groups', and 'Daily Service Records'. The 'Lookup' section is active, showing search criteria for 'Lookup by Group Id', 'Lookup by Group Session Id', 'Staff', 'Program', 'Group Number', 'Organizing Site', 'Group Type', 'Group Name', 'Group Topic', and 'Date Range'. A callout box with the text 'Click the Lookup button' points to the 'Lookup' button. The 'Search' button is visible at the bottom right of the form.

5. Scroll down to the bottom of the Edit Group Screen. The Group Sessions lists all of the Sessions already associated with the Group.
6. Click the **Create New** (Add) icon  to add a session to this group.

Group Sessions - 1 item					
Id	Date Time	Duration (hh:mm)	Location	Completed by	Participants
26295	2011/01/24 02:45	0:01	Bayers Road CBS	Royal, Erica(100501)	20

Click the Create New (Add) icon to add a session to this group

The Group Session screen will display.

- Populate the fields with information specific to this session. The fields in this example are populated randomly. Take care to enter in correct information.

NOTE:

- The **Session Time (24 Hr):** field is to indicate the starting time of the session; and
- The **Session Duration:** field is used to indicate how long the session took from start to completion (i.e. how many hours and/or minutes).

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Group Id: 19523 Organizing Staff: Royal, Erica(100501) Program Group Affiliated With: CCSS Women's Treat Serv
 Start Date: 2011/01/24 End Date: 2011/01/29 Group Number:
 Organizing Site: Bayers Road CBS Group Topic: Recreation Therapy Functional Intervention Group Name:

Group Session

Group Session Id:

Session Date: (yyyy/MM/dd) * Session Time (24hr): (HH:mm) * Session Duration: (HH:mm) *

Specify a location if other then Organizing Site

Other Site: < Please select > Other Location:

Other County:

Facilitator(s)

Available

Anderson, Rick(30034)
 Baird, Michelle(30102)
 Bates, Brenda(100243)
 Bernard, Darlene(100173)
 Bernard, Kimberley(30097)
 Black, Shaun(30014)
 Buckley, Michael(100137)
 Cantley, Jennifer(30091)

Populate the fields with information specific to the session.

All fields filled out in this example are done so randomly.

NOTE:

Details on specific fields can be found in the Data Definitions document, and in the Training Video specific to Groups and Sessions.

- Click the **Save** button.

Amount of Volunteer Time: (HH:mm)


Completed By: *

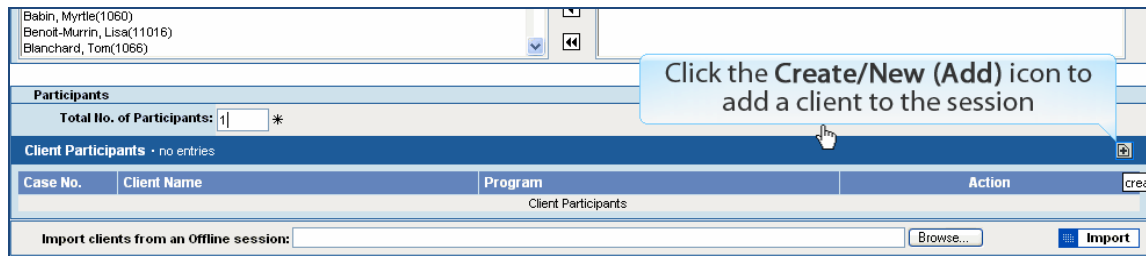
Click the Save button

Save

5.11.5 Adding Client Participants to a Session

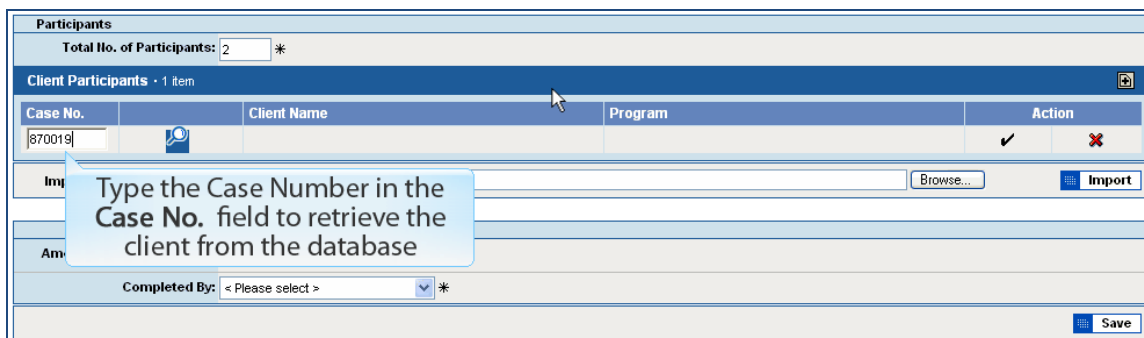
One or multiple participants can be added to a session to record their participation. To add a client participant to a session, following these steps.

1. A participant can be added by clicking on the **Create New** (Add) icon  in the Client Participants section.



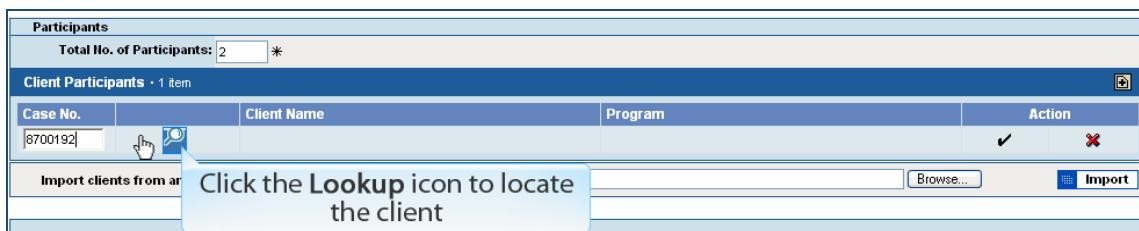
The screenshot shows the 'Client Participants' section of a software interface. At the top, there is a list of participants: Babin, Myrtle(1060), Benoit-Murrin, Lisa(11016), and Blanchard, Tom(1066). Below this, the 'Total No. of Participants' is set to 1. A blue callout box with a hand icon points to the 'Create New' icon (a square with a plus sign) in the top right corner of the 'Client Participants' section, with the text: 'Click the Create/New (Add) icon to add a client to the session'. The table below has columns: Case No., Client Name, Program, and Action. The 'Import clients from an Offline session' field is empty, with 'Browse...' and 'Import' buttons.

2. Type in the client's Case Number in the **Case No.** field to retrieve the client from the database.




The screenshot shows the 'Client Participants' section. The 'Total No. of Participants' is now 2. The 'Case No.' field contains the value '870019'. A blue callout box with a hand icon points to the 'Case No.' field, with the text: 'Type the Case Number in the Case No. field to retrieve the client from the database'. The 'Import' button is highlighted. The 'Completed By' dropdown menu is set to '< Please select >'. The 'Save' button is at the bottom right.

3. Click the **Lookup** icon  to locate the client.






The screenshot shows the 'Client Participants' section. The 'Case No.' field now contains '8700192'. A blue callout box with a hand icon points to the 'Lookup' icon (a magnifying glass) in the 'Case No.' field, with the text: 'Click the Lookup icon to locate the client'. The 'Import' button is highlighted. The 'Completed By' dropdown menu is set to '< Please select >'. The 'Save' button is at the bottom right.


4. Determine if the client returned is the correct client.
 - a. If this is the correct client, click the **Accept** icon ; and

Participants


Total No. of Participants: 1 *

Client Participants • 1 item


Case No.		Client Name	Program	Action
1100008		MacDonald, Jimmy		<input checked="" type="checkbox"/>  

Import clients from an Offline session:  **Import**




Amount of Volunteer Time: (H:M:mn)


Completed By: < Please select > * 

If this is the correct client, click the Accept icon


b. If this is not the correct client, click the **Cancel** icon .

Client Participants • 1 item


Case No.		Client Name	Program	Action
1100008		MacDonald, Jimmy		<input checked="" type="checkbox"/>  

Import clients from an Offline session:  **Import**



Amount of Volunteer Time: (H:M:mn)

Completed By: < Please select > * 

If this is not the correct client, click the Cancel icon

 **Save**

NOTE:


A Client Participant's profile can be edited at this time by clicking on the Edit/View icon . Proceed to make necessary changes then click the Accept icon .

Additional clients can be added by repeating these steps (beginning with clicking the Create/New (Add) icon). Repeat these steps until all the clients participating in the session have been added. The clients may require registration to the program to be added to the list. Refer to Program Registration (section 5.10) of this guide for details on how to register a client for a program.


Refer to section 6 of this manual for instructions on how to add clients using the swipe card method.

5. Click the **Save** button.

Amount of Volunteer Time: (H:M:mn)

Completed By: Royal, Erica(100501) * 

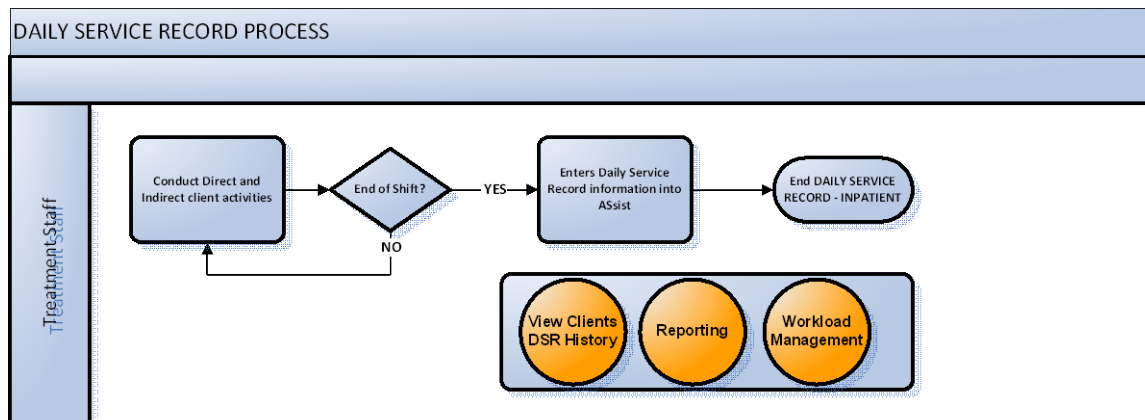
Click the Save button

 **Save**

5.12 Daily Service Records

Addiction Services Treatment staff record a variety of service recipient and non service recipient activities. The ASsist application provides an efficient means for capturing this information.

The following diagram outlines the business process for Daily Service Records in ASsist.



1. To access the Daily Service Records in ASsist, from the Home page, click the **Treatment** button.
2. Click on the **Daily Service Records** button.

The screenshot shows the ASsist application interface. The top navigation bar includes "Home", "Lookup", "Clients", "Groups", and "Daily Service Records". A blue callout box with a question mark icon says "Click the Daily Service Records button". Below the navigation bar, there is a "Lookup Client By" section with fields for "Case No:", "Health Card Number:", "Health Card Issuer:", "Last Name:", "First Name:", and "Date of Birth:". A "Lookup" button is at the bottom right of this section.

The Daily Service Records screen will appear.

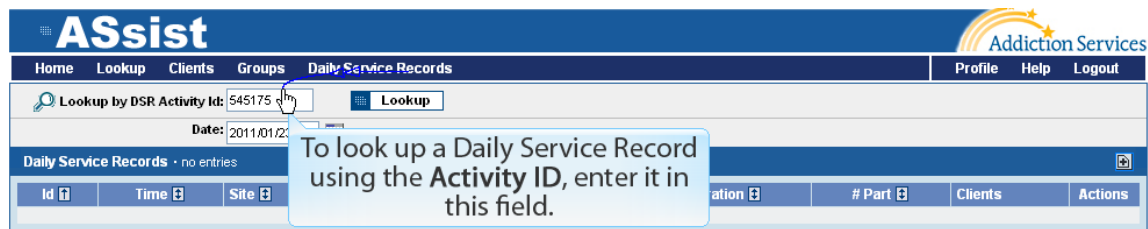
The screenshot shows the ASsist application interface with the "Daily Service Records" section active. A blue callout box says "The ASsist Treatment - Daily Service Record Activity page appears". Below the callout, there is a table with columns: "Id", "Time", "Site", "Activity", "Status", "Duration", "# Part", "Clients", and "Actions". The table is currently empty, with a message "No Daily Service Records found" below it.

5.12.1 Search for an existing Daily Service Record

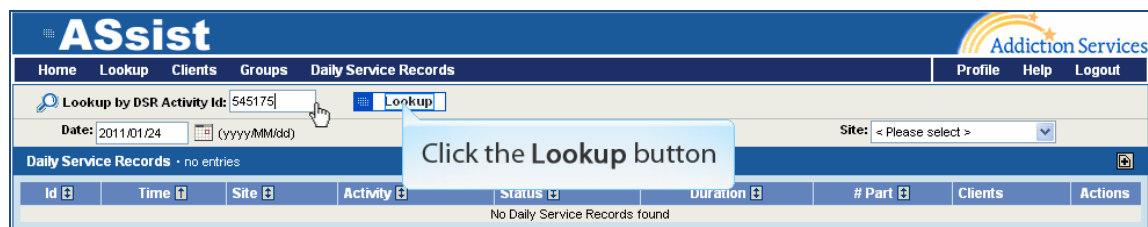
Example 1: Search using Activity ID

To locate an existing Daily Service Record using the Activity Id, perform these steps.

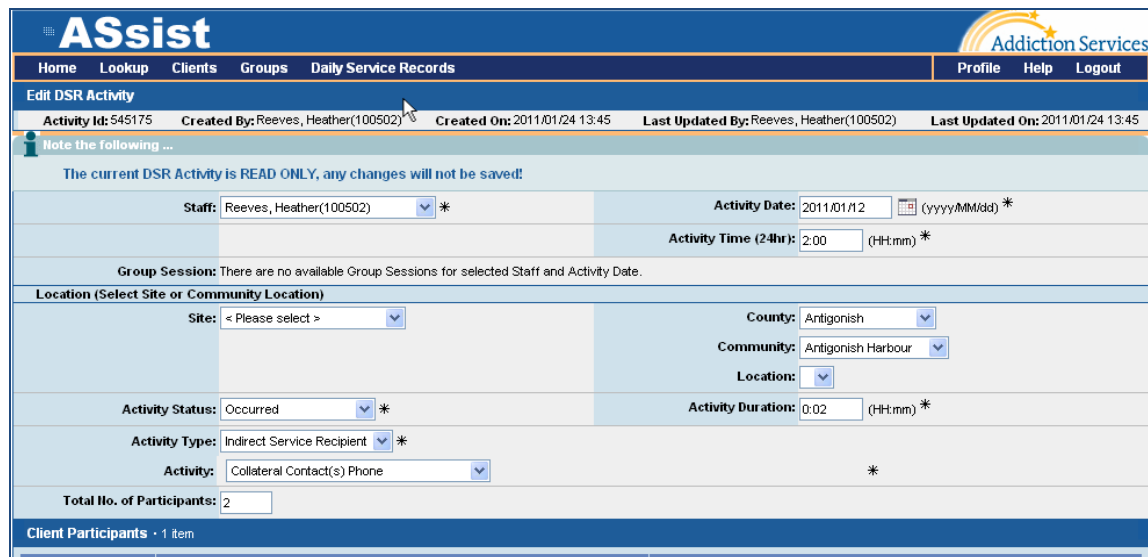
1. From the Home page, click **Treatment**.
2. Click the **Daily Service Records** menu button.
3. To look up a Daily Service Record using the Activity ID, enter it in the field, as shown.



4. Click the **Lookup** button.



The Daily Service Record matching the search criteria is displayed.



Example 2: Search using Date

A Daily Service Record can also be found by entering in the Daily Service Record date. In this example, the date field is used.

1. From the Home page, click **Treatment**.
2. Click the **Daily Service Records** menu button.
3. Type the date in the **Date** field, or click on the calendar to choose the date. In this example, the calendar is used.

The screenshot shows the ASsist web application interface. The top navigation bar includes 'Home', 'Lookup', 'Clients', 'Groups', 'Daily Service Records', 'Profile', 'Help', and 'Logout'. Below the navigation bar, there is a search section with 'Lookup by DSR Activity Id:' and a 'Lookup' button. The 'Date' field is set to '2011.02/15' with a calendar icon. A callout box points to the date field with the text: 'Type the date in the Date field, or click on the calendar to choose the date. In this example, the calendar is used.'

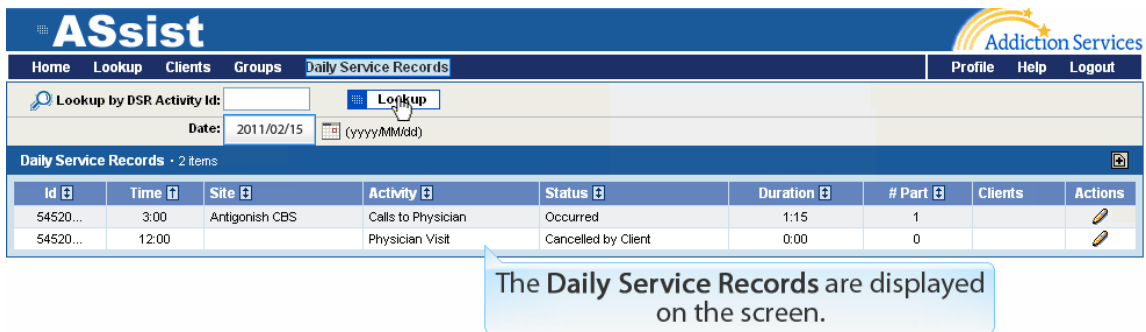
4. The calendar window appears. Choose the date. In this example, February 15, 2011 is chosen.

The screenshot shows the ASsist web application interface with a calendar window open. The calendar is for February 2011, and the date 15 is selected. A callout box points to the calendar with the text: 'The calendar window appears. Choose the date. In this example, February 15, 2011 is chosen.'

5. Click the **Lookup** button.

The screenshot shows the ASsist web application interface after clicking the 'Lookup' button. The 'Date' field is set to '2011.02/04'. A callout box points to the 'Lookup' button with the text: 'Click the Lookup button'.

The Daily Service Records are displayed on the screen.



ASsist Addiction Services

Home Lookup Clients Groups **Daily Service Records** Profile Help Logout

Lookup by DSR Activity Id:

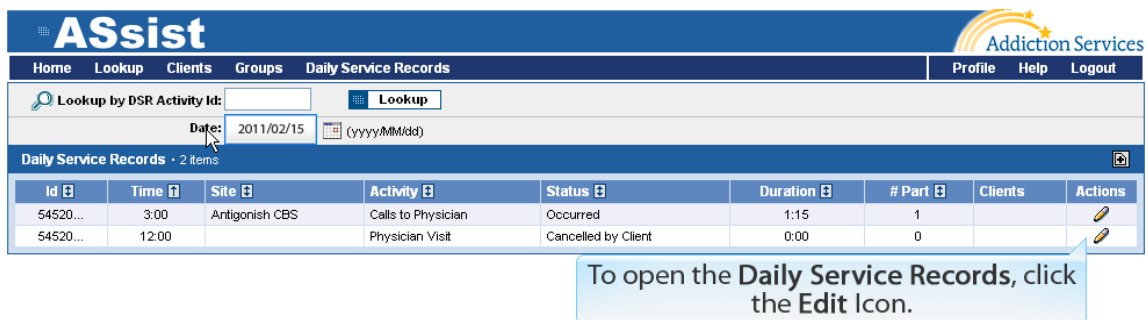
Date: 2011/02/15

Daily Service Records • 2 items

ID	Time	Site	Activity	Status	Duration	# Part	Clients	Actions
54520...	3:00	Antigonish CBS	Calls to Physician	Occurred	1:15	1		
54520...	12:00		Physician Visit	Cancelled by Client	0:00	0		

The Daily Service Records are displayed on the screen.

6. To open a Daily Service Record, click the **Edit** icon.



ASsist Addiction Services

Home Lookup Clients Groups **Daily Service Records** Profile Help Logout

Lookup by DSR Activity Id:

Date: 2011/02/15

Daily Service Records • 2 items

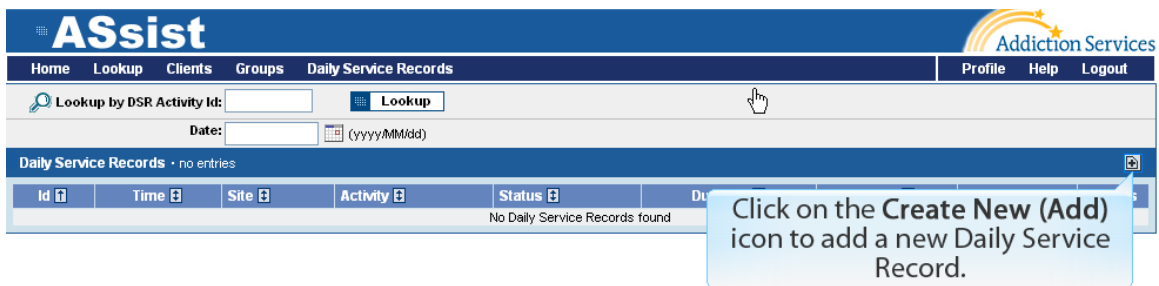
ID	Time	Site	Activity	Status	Duration	# Part	Clients	Actions
54520...	3:00	Antigonish CBS	Calls to Physician	Occurred	1:15	1		
54520...	12:00		Physician Visit	Cancelled by Client	0:00	0		

To open the Daily Service Records, click the Edit icon.

5.12.2 Create a Daily Service Record

To create a new Daily Service Record, follow these steps.

1. Click on the **Create New (Add)** icon  to add a new Daily Service Record.



ASsist Addiction Services

Home Lookup Clients Groups **Daily Service Records** Profile Help Logout

Lookup by DSR Activity Id:

Date:

Daily Service Records • no entries

ID	Time	Site	Activity	Status	Duration	# Part	Clients	Actions
No Daily Service Records found								

Click on the Create New (Add) icon to add a new Daily Service Record.

2. Fill in the appropriate information regarding the new Daily Service Record.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Edit DSR Activity

Staff: Reeves, Heather(100502) * Activity Date: 2011/01/23 (yyyy/MM/dd) *

Activity Time (24hr): 2:30 (H:mm) *

Group Session: There are 0 available Group Sessions for selected Staff and Activity Date.

Location (Select Site or Community Location):

Site: < Please select > County: Community: Location:

Activity Status: <Select an activity> * Activity Duration: (H:mm) *

Activity Type: <Select an activity type> *

Activity: *

Total No. of Participants: *

Client Participants • no entries

NOTE:

- The **Activity Time (24 Hr):** field indicates the starting time of the DSR Activity; and
- The **Activity Duration:** field is used to indicate how long the activity took from start to completion (i.e. how many hours and/or minutes).

3. Click the **Save** button.

Client Participants • no entries

Case #	Name	Program	Action

Click the "+" to add a Client Participant

Charge To: < Please select > *

Save Save + New Cancel

NOTE:

- The **Save** button saves the single activity and returns user to the DSR search;
- The **Save + New** button saves the single activity, but allows user to remain on the Activity page to add an additional activity; and
- To cancel a Daily Service Record without saving, click on the **Cancel** button.

When saved, the Daily Service Record will then be displayed on the Daily Service Record screen.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Note the following ...

The DSR Activity has been successfully saved.

Lookup by DSR Activity Id: 545175 Lookup

Date: 2011/01/23 (yyyy/MM/dd)

Daily Service Records - 1 item

Id	Time	Site	Activity	Status	Duration	# Part	Clients	Actions
54517...	2:30	Antigonish CBS	Assessment	Occurred	0:01	1		

5.12.3 Add a client to a Daily Service Record

Pre-requisites: Logged in and Daily Service Record to which the client will be added, is visible on the screen.

1. From the **Home** page, click on the **Treatment** button.
2. Click on the **Daily Service Record** button.
3. To add a client to a Daily Service Record, first locate the Daily Service Record to which the client will be added.

In this example, the **Activity Id** is entered.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by DSR Activity Id: 5451 Lookup

Date: 2011/01/23 (yyyy/MM/dd)

Daily Service Records - 1 item

To add a client to a DSR, first locate the Daily Service Record to which the client will be added.

Id	Time	Site	Activity	Status	Duration	# Part	Clients	Actions
54517...	2:30	Antigonish CBS	Assessment	Occurred	0:01	1		

4. Click the **Lookup** button.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

Lookup by DSR Activity Id: 545176 Lookup

Date: 2011/01/23 (yyyy/MM/dd)

Daily Service Records - 1 item

Click the **Lookup** button

Id	Time	Site	Activity	Status	Duration	# Part	Clients	Actions
54517...	2:30	Antigonish CBS	Assessment	Occurred	0:01	1		

5. Click on the **Add New** Icon under Client Participants to add a client to this Daily Service Record.

Activity Type: Direct Service Recipient *
 Activity: Assessment
 Total No. of Participants: 1

Client Participants - no entries

Case #	Name	Program	Action
Click the "+" to add a Client Participant to this Activity.			

Charge To: AIP - North of Smokey CBS - Community *

Save Save + New Cancel Delete

Click the Create New (add) icon to add a client to this DSR

6. Type the **Case Number** in the **Case No.** field

Activity: Assessment *
 Total No. of Participants: 1

Client Participants - 1 item

Case #	Name	Program	Action
			✓ ✕

Charge To: AIP - North of Smokey CBS - Community *

Save Save + New Cancel Delete

Type in the client's Case Number in the Case # field

7. Click the **Lookup** icon .

Client Participants - 1 item

Case #	Name	Program	Action
1234567			✓ ✕

Charge To: AIP - North of Smokey CBS - Community *

Save Save + New Cancel Delete

Click the Lookup icon

8. Determine whether the returned client is correct.

- a. Click on the **Accept** icon ✓ to add the client to the Daily Service Record; and

Total No. of Participants: 1

Client Participants - 1 item

Case #	Name	Program	Action
1234567	ABCDEFGH, ZABCD		✓ ✕

Charge To: AIP - North of Smokey CBS - Community *

Save Save + New Cancel Delete

Click the Accept Icon to add the client to the Daily Service Record

- b. To cancel a Client Participant, click on the **Cancel** icon ✕.

Activity: Assessment *
 Total No. of Participants: 1

Client Participants - 1 item

Case #	Name	Program	Action
1234567	ABCDEFGH, ZABCD		✓ ✕

Charge To: AIP - North of Smokey CBS - Community *

Save Save + New Cancel Delete

Click the Cancel Icon to delete the client from the Daily Service Record

- Click the **Save** button.

Repeat this process until all clients participating in the session have been added to the Daily Service Record in ASsist.

5.13 Referrals

Referral Recommendations are recommendations that an Addiction Services' client seek treatment or service elsewhere. There are two types of referrals, internal and external. Internal referrals are referrals to another Addictions Services' site or program within the province, and external referrals are to another organization or agency outside of provincial Addiction Services.

5.13.1 Create a referral Recommendation

The Referral Recommendations screen can be accessed either through the **Intake** or **Program Registration** screen. The process is exactly the same, the only difference being the current screen the user is on either Intake or Program registration when adding a new Referral.

The following outlines the steps involved in creating a Referral from either the **Intake** or the **Program Registration** screen.

- Lookup the client to whom a referral will be made.

In this example, the Case No. field is used to find the client.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

To perform a quick lookup, select one of the following... *

Lookup Client By

Case No: *

Health Card Number: *

Last Name: * Date of Birth: (yyyy/MM/dd) *

2. Click the **Lookup** button.

ASsist Addiction Services

Home Lookup Clients Groups Daily Service Records Profile Help Logout

To perform a quick lookup, select one of the following... *

Lookup Client By

Case No: *

Health Card Number: * Health Card Issuer: NS *

Last Name: * First Name: * Date of Birth: (yyyy/MM/dd) *




The client details will be displayed on the Client Profile screen.


3. Scroll down to the section of the Client Profile screen that displays **Intake** and **Program Registration** information.

Open either the Intake or the Program Registration screen to add a referral. In this example, the Intake screen is used.

4. Click the **Edit/View** icon  to access the Intake screen.

Intake/Service Entry - 2 items

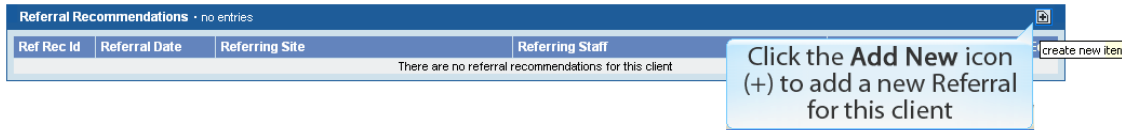
	Intake Id: 77862	Level of Priority: General	Start Date and Time: 2010/01/06 11:07	Intake Site: Sydney PCU	<input type="button" value="Edit"/>			
		Outcome: Placed on Waiting List	Recommended Program: Withdrawal Management Inpatient	Intake Assigned To:				
	Program Registrations - 1 item							
	Id	Program Name	Site	Start Date	Discharge Date	Reason for Discharge	Edit	
		56296	Withdrawal Management Inpatient	Sydney PCU	2010/01/07	2010/01/11	Dismissed - Rules/Policy Breach	

	Intake Id: 55018	Level of Priority: General	Start Date and Time: 2008/11/24 14:36	Intake Site: Sydney CBS	<input type="button" value="Edit"/>		
		Outcome: Continue with AS Program - No Bed	Recommended Program: CBS General	Intake Assigned To: MacCuish, Gary(1097)			
	Program Registrations - no entries						
	Id	Program Name	Site	Start Date	Discharge Date	Reason for Discharge	Edit
	No items in list!						

The Intake Screen (or Program Registration Screen) will be displayed.

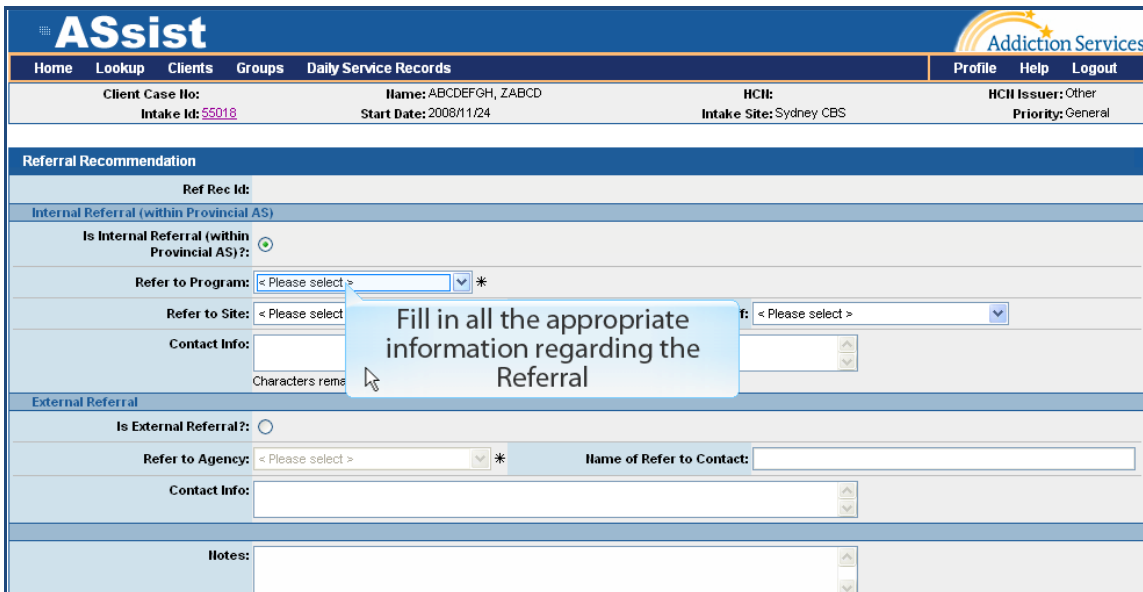
5. Scroll to the bottom of the Intake screen to the Referral Recommendations section.

6. Click on the **Create New** (Add) icon  to add a new Referral for this client.



The Referral Recommendations screen will be displayed.

7. Fill in all the appropriate information regarding the referral.



NOTE:

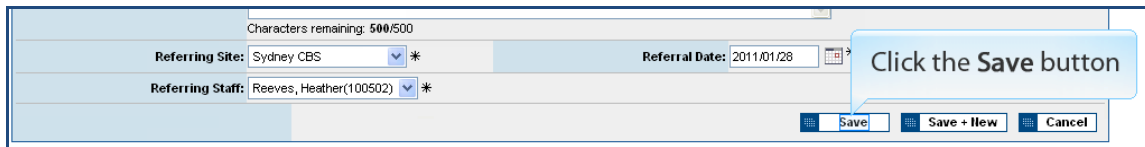
For complete information on fields specific to a Referral, see the Data Definitions document. Here are some fields to note.

- If the referral is an internal referral, click the respective radio button and enter the details in the internal referral section of the screen;
- If the referral is an external referral, click on the respective radio button, and enter the details in the external referral section of the screen; and
- If there are additional comments, provide this in the notes field, and proceed to complete the rest of the referral recommendation details.

NOTE:

Client details and the Intake ID automatically populate the top part of the referral recommendations screen. This summary information cannot be edited from the referral recommendation screen.

8. Click the **Save** button.



The screenshot shows a web form for referral recommendations. At the top, it says 'Characters remaining: 500/500'. Below this, there are two dropdown menus: 'Referring Site:' with 'Sydney CBS' selected, and 'Referring Staff:' with 'Reeves, Heather(100502)' selected. To the right of these is a 'Referral Date:' field with '2011/01/28' and a calendar icon. At the bottom right, there are three buttons: 'Save', 'Save + New', and 'Cancel'. A blue callout box with the text 'Click the Save button' points to the 'Save' button.

NOTE:

- The **Save** button saves the single referral;
- The **Save + New** button saves the referral, but reloads the page to add an additional referral; and
- To cancel a referral without saving, click the **Cancel** button.

5.14 Merging Clients

There may be instances where a user needs to merge two client cases together. This may be due to duplicate client entry or other similar reasons. The result will be one Case ID for one client, with all the combined data. The Client ID and Case ID from the first client selected will be kept as the prime. The client profile that will be used will be the more recently updated profile based on **Collection Date**.

NOTE:

Most users do not have the capability or authorization to merge clients. This is a system administrator function.

To merge two clients into one file, follow these steps.

1. Fill out the ASsist Client File Correction form (a copy of this form can be found on Knowledge Center).
2. Submit the completed ASsist Client File Correction form to the DHA RSO or the Provincial ASsist Team.

6. SWIPE CARD FUNCTIONALITY IN ASSIST


Instructions for Directly Adding Client Participants to Group Sessions on ASsist

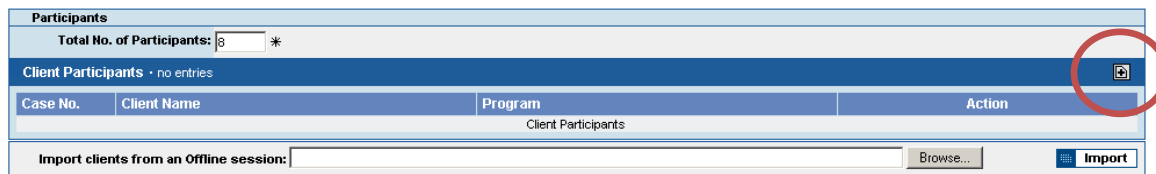
Changes have been made to ASsist to allow group facilitators to directly add client participants to ASsist using the swipe card system. This new method prevents staff from having to manually enter client participants on ASsist.

Requirements:

1. An Internet connection;
2. Access to ASsist; and
3. Swipe card reader

Directions:

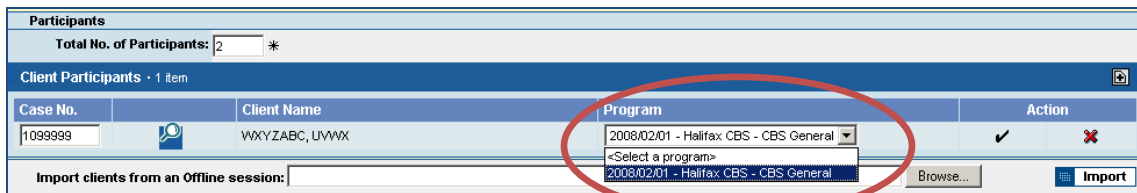
1. On the Group Session screen click on the **Create New icon**  (circled in red).



Case No.	Client Name	Program	Action
Client Participants			

Import clients from an Offline session: Browse...

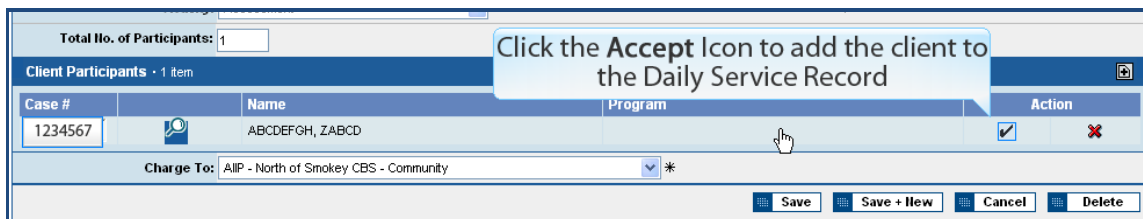
2. Swipe the card through the card reader. The client's case number and name will appear on the screen. Verify you have the correct client.
3. Select the program registration from the drop down box.



Case No.	Client Name	Program	Action
1099999	WXYZABC, UVWX	2008/02/01 - Halifax CBS - CBS General	✓ ✗

Import clients from an Offline session: Browse...

4. Determine whether the returned client is correct.
 - a. Click on the **Accept icon** ✓ to add the client to the Daily Service Record.



Case #	Name	Program	Action
1234567	ABCDEFGH, ZABCD	Charge To: AIP - North of Smokey CBS - Community	✓ ✗

Save Save + New Cancel Delete

- b. To cancel a Client Participant, click on the **Cancel icon** ✗.

Activity: Assessment

Total No. of Participants: 1

Client Participants - 1 item



Case #	Name	Program	Action
1234567	ABCDEFGH, ZABCD		✓ ✕

Charge To: AIP - North of Smokey CBS - Community *

Save Save + New Cancel Delete

Click the **Cancel** Icon to delete the client from the Daily Service Record

NOTE:

A Client Participant can be edited at this time by clicking on the Edit/View icon . Proceed to make necessary changes then click the Accept icon .

- Repeat these steps until all client participants in the group session have been added.
- Click the **Save** button.

Amount of Volunteer Time: (HH:mm)

Completed By: Royal, Erica(100501) *

Save

Click the **Save** button

7. PROVINCIAL ASSIST PAPER FORMS

The paper versions of the Provincial ASsist Forms are available through the ASsist Knowledge Centre. To access the forms, simply click the “ASsist” link in the Knowledge Centre on the ASsist Home Page.

The paper forms are to be used only when ASsist is unavailable, either due to a planned or unplanned outage. The only exception are staff who work in remote locations (for example, schools), where there is no network access to ASsist.

Information captured on paper forms should be entered directly into ASsist as soon as possible after initially captured. All data collected for any given month is expected to be entered into ASsist by the 5th business day of the following month.

Paper forms must be printed for use – they are not intended for (and do not allow) electronic entry.

Each DHA varies in the policies and guidelines for the usage of paper forms including the printing, storage, and retention of them. Check with the Provincial ASsist Champion (RSO/QMC, etc) in your DHA for details on the paper form process.